



Delivering whole-house energy savings to improve comfort and help protect the environment.

Please mail or fax this completed form to:

HOME PERFORMANCE WITH ENERGY STAR
US EPA (Mail Code 6202J)
1200 Pennsylvania Ave, NW
Washington, DC 20460
FAX: 202-343-2200

Home Performance with ENERGY STAR: Program Requirements

Eligible Organizations: Organizations that implement a residential home improvement program that meets Home Performance with ENERGY STAR criteria.

Through this Agreement, ENERGY STAR and [blank] (hereafter "the partner") to work in cooperation to promote the Home Performance with ENERGY STAR under the program name [blank] (hereafter "the program").

To be completed by authorized program representative:

Address: [blank]
City/State/Zip: [blank]
Telephone: [blank] Fax: [blank]
E-mail: [blank] Web Site: [blank]

Commitments

The following are the terms of the ENERGY STAR Partnership Agreement as it pertains to Home Performance with ENERGY STAR Partner. The ENERGY STAR Partner under Home Performance is defined as a program sponsor who agrees to the following commitments, and is legally independent from contractors performing home improvements under this program

The Partner must adhere to the following program requirements:

- Comply with current ENERGY STAR Identity Guidelines, which describe how the ENERGY STAR marks, marketing graphics, and name may be used.
Promote a program of whole house, building science-based improvements to existing homes using Home Performance with ENERGY STAR. The program must consist of the following components:
1. A bona fide whole house approach. An energy specialist trained in building science principles will perform a complete visual and diagnostic energy inspection of all of the home's thermal and mechanical systems including attics, exterior walls, infiltration, windows, basement, heating and hot water systems.
2. Facilitation of the installation of recommended measures. Home Performance with ENERGY STAR is not an audit program. Instead, the audit is only the first step in an integrated effort to see that improvement measures are actually installed in homes.

3. **Diagnostic testing.** Diagnostic testing will be used to determine appropriate measures with post-installation testing to verify the performance of installed measures as well as the meeting of health and safety standards. Diagnostic testing will include measuring of air infiltration and duct leakage, and combustion safety testing to ensure health and safety standards. (ASTM Standard E1998-99, “Standard Guide for Assessing Depressurization-Induced Backdrafting and Spillage from Vented Combustion Appliances”; Section H of the National Fuel Gas Code (ANSI Z223.1/NFPA 54); or Canada General Standards Board- 51.71-95, “The Spillage Test Method to Determine The Potential for Pressure Induced Spillage from Vented, Fuel-fired, Space Heating Appliances, Water Heaters and Fireplaces” for example) Exception: “Sealed combustion” appliances, which draw their combustion air from outdoors and exhaust combustion products directly outdoors, with no connection between combustion air and the indoors, do not have to be tested.
4. **Quality Assurance.** It is essential that Home Performance with ENERGY STAR be consistent with and protect the ENERGY STAR message, support the credibility of the government-backed mark, and offer results to consumers. This quality assurance can be obtained through (1) either a rigorous certification and accreditation process recognized by EPA OR (2) through qualified oversight and inspection by a third party, in the form of a State or qualified ENERGY STAR partner:
  - **Certification/Accreditation.** A certification process at least as rigorous as the technical certifications offered by the Building Performance Institute can satisfy this requirement. This would include written and performance-based skill evaluations in all relevant areas. The evaluation will be against consensus-based building science standards; and an accreditation agreement in which the contractor performing the work in the house agrees to meet the standards in all work performed, using oversight by certified technicians with appropriately trained crews. Further, the contractor must agree to establish and use internal quality control and consumer complaint resolution procedures, and agree to oversight—including such mechanisms as record review and job inspections—by the certifying/accrediting body or the ENERGY STAR Partner, **OR**,
  - **Inspection Oversight.** The ENERGY STAR Partner will ensure that participating contractors receive building science and measure training sufficient to perform the diagnostic testing and properly install improvement measures. Further, the ENERGY STAR Partner or designated agent will directly inspect the completed work at no less than a 15% sampling rate to ensure that cost-effective recommendations are being reasonably presented to homeowners and that measures are performed according to established standards.

In addition, the partner is responsible for the proper use of the ENERGY STAR marks, as well as the proper use of the Home Performance with ENERGY STAR marketing graphic used by contractors. Continued misuse of the graphic by a contractor or the ENERGY STAR marks by the Partner is grounds for suspension or termination of this partnership agreement.

- Develop and submit, **with signed Partnership Agreement**, a program plan to implement Home Performance with ENERGY STAR for the coming year. This plan shall explicitly describe how contractors shall perform the whole house evaluation and link recommended improvements with contractors who can perform the improvements. The plan shall also describe the Partner’s quality assurance plan to ensure proper installation of the recommended improvements. In addition, the Partner shall also describe how it will utilize the ENERGY STAR messages, marks, and online tools to promote its program as well as monitor the proper use of the Home Performance with ENERGY STAR graphic by contractors. After the Partner submits a program plan and ENERGY STAR reviews and approves it, the Partner will be listed as an ENERGY STAR Partner. The Partner shall submit this plan annually to EPA ;
- Feature the ENERGY STAR marks(s) on Partner Web site and in other promotional materials. When information concerning ENERGY STAR is provided on the Partner Web site as specified by the ENERGY STAR Web Linking Policy (this document can be found under Tools and Library in the Partner Resources section on the ENERGY STAR Web site at [www.energystar.gov](http://www.energystar.gov)), EPA may provide links where appropriate to the Partner Web site;
- Submit all Web site designs, and marketing materials, developed for Partner’s ENERGY STAR promotions to EPA for review to ensure accuracy of ENERGY STAR marks use and consistency of the ENERGY STAR message. Partner will allow a minimum of five full working days for EPA to review and approve Web site designs and marketing materials;
- Provide ENERGY STAR training to all employees who provide customer service. This training shall include: a) a description of ENERGY STAR, b) tips for answering questions about ENERGY STAR, and c) information on the economical and environmental benefits of energy efficiency;

- Provide to EPA, on a quarterly basis, market indicators to assist in determining the effects of the program in promoting home improvement projects. EPA will use the data only for program evaluation purposes. The following data should be submitted in electronic format:
  - Number of consumer initiated calls and contacts
  - Number of participating contractors
  - Number of successful referral
  - Number of jobs completed
  - Actual or estimated energy savings from home improvement activities resulting from the Home Performance with ENERGY STAR program.
  - Consumer and program costs
  - Description of quality control activities performed and its outcomes
- Notify EPA of a change in the designated responsible party or contacts for contractor referral networks within 30 days.

**Performance for Special Distinction**

In order to receive additional recognition and/or support from EPA for its efforts within the Partnership, the ENERGY STAR Partner may consider the following voluntary measures and should keep EPA informed on the progress of these efforts:

- Provide quarterly, written updates to EPA as to the efforts undertaken by Partner to promote awareness of ENERGY STAR and its message;
- Provide educational materials on ENERGY STAR and whole house building science to a broad range of contractors and encourage the broader adoption of whole-house approaches through the residential building trades.

**General Terms and Disclaimers**

- Partner will not construe, claim, or imply that its participation in ENERGY STAR constitutes federal government approval, acceptance, or endorsement of anything other than the partner's commitment to ENERGY STAR. Partnership does not constitute federal government endorsement of the partner.
- Partner understands that the activities it undertakes in connection with ENERGY STAR are voluntary and not intended to provide services to the federal government. As such, the partner will not submit a claim for compensation to any federal agency.
- Partner and ENERGY STAR will assume good faith as a general principle for resolving conflict and will seek to resolve all matters informally, so as to preserve maximum public confidence in ENERGY STAR.
- This agreement is wholly voluntary and can be terminated by either party at any time or any reason, with no penalty.

Authorized Partner Representative (printed name): \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**To be completed by US EPA and DOE:**

Kathleen Hogan; Director, Climate Protection Partnerships Division, US Environmental Protection Agency

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

David E. Rogers; Program Manager, Building Technologies Program, U.S Department of Energy

Signature \_\_\_\_\_ Date: \_\_\_\_\_