



HELIX PROJECT KICKOFF MEETING

Date: Thursday, April 28, 2016
Time: 9:00PM - 12:45 PM
Location: Vermont Public Service Department, Montpelier

Action Items:

- Joan connects with Richard and Liz on new Fannie Mae HomeStyle mortgage
- David, NEEP, and Kelly set up biweekly calls
- NEEP sends project team meeting notices for reporting deadline due dates
- Laura calls David to confirm DOE template for reporting
- David sends NEEP template used for REVEAL project
- NEEP sends sheet to project team for everyone to add staff names & emails to
- NEEP sends project team recurring meeting notice
- Carolyn talks with Richard about growing support in ME
- NEEP modifies HELIX Summit schedule for October/November timeframe
- NEEP sends project team sheets to enter fall dates to avoid and potential venue ideas - likely for MA
- Liz discusses similar models with Ahson (e.g. Medicaid)
- NEEP communicates decision made to whole group at June 1 meeting
- Carolyn reports back on Better Buildings expo on what 3rd parties are adding on to SEED
- Liz follows up with Craig on real estate realities in VT
- NEEP sends HELIX outreach list sheet for everyone to add individuals (organized by industry/role)
- NEEP sets up public webinar and private opportunities for feedback from these groups (RFI)



MEETING NOTES - Action items in green

Introductions

(key project staff in bold)

Affiliation	Name	Home Energy Labeling experience
Northeast Energy Efficiency Partnerships (NEEP)	Carolyn Goldthwaite	Since inception of Home Energy Score
	Kevin Rose	Works with entire region on policies/programs
	Charlie Taylor	Works on real estate market resources
	Jim O'Reilly	Involved since 2009 NEEP whitepaper on rating & disclosure
	Laura DeAngelo	[NEEP grants manager]
	Sue Stocker	[NEEP accounts manager]
U.S. Department of Energy (DOE)	David St. Jean	Formerly advanced energy codes in MD
	Joan Glickman	Home Energy Score and Information Accelerator project manager
	Harry Bergmann	Manages SEED collaborative
Vermont Public Service Department (PSD)	Kelly Launder	Past and present work in REVEAL and Efficiency VT labeling
Vermont Energy Investment Corporation (VEIC)	Emily Levin	many years of work at VEIC
	Leslie Badger	labeling analyst
	Liz Curry	low-income background, new to "this side of table"
Energy Futures Group (EFG)	Richard Faesy	Working since mid-80s, consultant to 3 states in region on labeling
Sustainable Real Estate Consulting Services	Craig Foley	Work with NAR, MA MLS, and parallel solar PV auto-population effort
Vermontwise Energy Services	Jeff Gephart	outreach to real estate market (VEIC contractor)
Vermont Law School (VLS)	Kevin Jones	New to labeling, also working on solar auto-pop effort
	Mark James	VT Law School fellows working on solar auto-pop
	Roxana Mastor	
Massachusetts Department of Energy Resources (DOER)	Alissa Whiteman	involved in since 2012 through MassMPG pilot
National Association of State Energy Officials (NASEO)	Todd Sims	Working in energy codes - involved in HES on periphery
A3P Strategies	Ahson Wardak	IT consultant to DOE for Home Energy Score
CSRA	Patty Kappaz	DOE Home Energy Score contractor - state & local government



HELIX Kickoff meeting notes

- **Joan connects with Richard and Liz on new Fannie Mae HomeStyle mortgage**
- DOE HELIX project support staff breakdown:
 - DOE Home Energy Score program general support - Patty, Joan
 - Home Energy Score IT support - Glen Dickey - CSRA, Dave Miller - PNNL
 - Home Energy Information Accelerator - Pamela Brookstein, Laura Stukel

DOE Update / Remarks David / Joan DOE

- David and Joan both provided remarks about how they are happy the project is moving forward and are looking forward to working with the team.
- **David, NEEP, and Kelly will have biweekly calls** (calls have been scheduled)

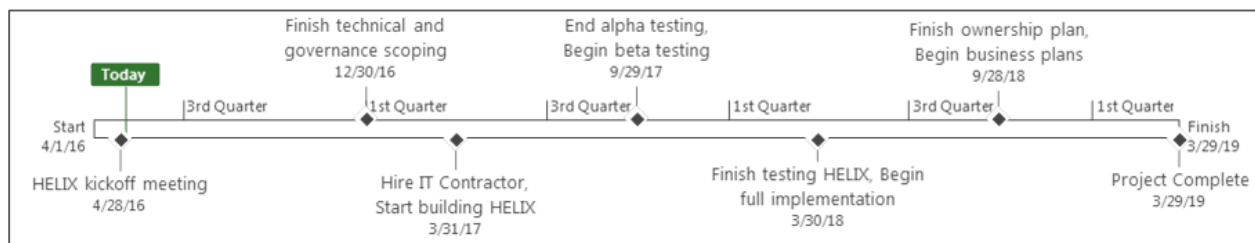
Contract items

- Quarterly reports / invoices (Sue S / Laura D NEEP on the phone)
 - **NEEP sends project team meeting notices for reporting deadline due dates**
 - **Laura calls David to confirm DOE template for reporting**
 - **David sends NEEP template used for REVEAL project**

Bi-monthly team calls

- Provisionally scheduled for first Wednesday of every other month at 2pm
 - **NEEP sends sheet to project team for everyone to add names & emails to**
 - **NEEP sends project team recurring meeting notice**
 - Note: Kevin Jones will not be able to make first meeting (June 1)

Year one project plan



<<see meeting slides and Gantt chart for detailed breakdown>>

- State support: VT, MA (strong commitment), RI (OER/N.Grid), CT(Eversource/UI), NY(NYSERDA), NH (REVEAL)- but need more support in ME
 - **Carolyn talks with Richard about growing support in ME**
 - Labeling IS in triennial plan, NEEP has met with interested stakeholders
- HELIX Year 1 Summit: looking to disseminate AND collect information to help guide project



HELIX Kickoff meeting notes

- Extension of sorts of NEEP's April 2015 meeting of regional labeling leaders
- **NEEP modifies HELIX Summit schedule for October/November timeframe**
- **NEEP sends project team sheets to enter fall dates to avoid and potential venue ideas - likely for MA**
- Even if building off SEED platform is the answer for HELIX, issues of governance and database management (Task 6) remain since someone still needs to host, operate, etc.
 - **Liz discusses similar models with Ahson (e.g. Medicaid)**
- IT contractor: \$275,000 is included in current funding for building HELIX itself
 - NEEP is exploring routes for additional funding
- Other non-DOE Home Energy Score certifications/ratings like HERS will be considered in technical scoping (and are called out in the IT budget).
 - Having all this info is what MLSs really need to get value from HELIX
 - All MLSs should be able to handle this labeling info by 2018 (RESO green fields)

SEED update

- HPXML implementation for Home Energy Score (HES) will follow completion of Commercial Asset Score in June
- Currently HES can import HPXML but not export. SEED is working with Joan on this.
- Not many conversations yet with the ~700 MLSs nationwide. Most use third party vendors for database development maintenance (e.g. CoreLogic, Black Knight, RapiTone).
- Changing SEED ownership model
 - Completing SEED business plan over next 4-5 weeks. Two options:
 - 1. Offload to private sector entity (after core code is developed) that will provide visualization/analytics and platform mgmt
 - 2. Offload to nonprofit/NGO that will manage user base & code base, and handle communications outward
 - **NEEP communicates decision made to whole group at June 1 meeting**
 - Note: this is a strategic decision, and actual changes not being made until 2017
 - **Carolyn reports back on Better Buildings expo on what 3rd parties are adding on to SEED**

Observer list (brief update / overview of current efforts)

- In the 12 state NEEP region, something is going on in regards to labeling in each state
- REVEAL - VT/NH project working on increasing number of labeled homes
 - Currently in year 2. 18 people have passed HES training (incl. 1 home inspector)
 - VT - homeowners will have to pay for it, and are more focused on time of sale
 - The market driver for \$300/\$500 score is TBD. An energy inspection add on by home inspectors would be key mechanism for mobilizing this.
 - Ricard- 250 VT home baseline will also be provided as part of NMR study baseline (these will be informal)
 - **Liz follows up with Craig on real estate realities in VT**



HELIX Kickoff meeting notes

- NH - further behind. GDS is acting as provider and using existing DOE systems wherever possible. Also focusing on market based approaches.
- Parallel efforts outside the northeast region
 - Build it Green (California)
 - Working on similar effort to HELIX. They have a group of volunteers working on the project who have figured out IT issues.
 - Key differences from HELIX: not open source and state level
 - Oregon Trust
 - EMPRESS project (HERS-HES alignment) participant.
 - Have indicated interest in funding/contributing to HELIX.
 - Earth Advantage
 - Provide IT/data management services to many labeling projects throughout the country
- DOE PV Auto-Pop Roadmap project
 - MA and San Diego are currently writing roadmap for implementing PV info auto-population into MLSs.
 - On HELIX team, Craig, Carolyn, Alissa, and Kevin J (plus Mark and Roxana), are part of this.
 - MA is now auto-populating PV info through MA Clean Energy Center and Warren Group (data aggregator)
 - HELIX could serve as the way to connect disparate data sources so to streamline connection to MLSs.
 - Info exchange through software APIs might not always be the pathway - need to get the MLSs engaged in all states.

Develop stakeholder list

- States, utilities, local efforts (e.g. REVEAL), MLSs (e.g. NEREN), real estate orgs (e.g. RI Association of REALTORS), LBNL (PV APR), Elevate (HEI Accelerator)
 - **NEEP sends HELIX outreach list sheet for everyone to add individuals (organized by industry/role)**
- Automated energy modeling groups (e.g EnerScore, ClearlyEnergy)
 - All team members should channel information through NEEP
 - We need to be on the same page at least since they are talking with real estate portals.
- Should develop guidelines for people who are looking to get business from this.
 - **NEEP sets up public webinar and private opportunities for feedback from these groups (RFI).**

Upcoming events / outreach opportunities

- [NEEP Summit June 13-14](#) (valuation workshop), Craig talking to Passive House MA soon