

# ***MLS Energy Project***

## **USING THE ENERGY EFFICIENCY PROFILE**

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# *Topics Addressed in this Session:*

- Introduction: MLS Energy Project and background
- The Process: Listing fields developed with Real Estate Pro's input
- Energy Efficiency Profile: Overview of fields
- Using the Energy Efficiency Profile
- Searching for Listings containing the Energy Efficiency Profile
- Take-Along Glossary provided to your MLS as separate file

# *Introduction*

- Introducing Conservation Services Group (CSG) & the MLS Energy Project
- The need for Energy Efficiency data in listings and MLS efforts around the nation
- Strong Public Emphasis on Efficiency in NY via NYSERDA, LIPA, Utility Companies & other Agencies

**Conservation Services Group (CSG)** is a national energy services firm founded in 1984, providing energy savings strategies, program design, management services and technologies to utilities, government agencies, energy services companies, public housing authorities and other groups. The firm has more than 20 offices nationwide, employs 750 staffers, and has offices throughout New York State.

**The MLS Energy Project**, led by **CSG**, began in October 2010, established by a grant awarded to CSG by the **Doris Duke Charitable Foundation**. Our working group includes REALTORS® and stakeholders from across Upstate New York, Staten Island and Long Island; aiming to establish Multiple Listing Service (MLS) categories for Energy Efficiency information. **Pace University's Energy & Climate Center** assists in technical research, and the **New York State Energy & Research Development Authority (NYSERDA)** provides valuable feedback on project efforts.

# *Why is Energy Efficiency data needed on MLS?*

Consumers increasingly want efficiency (88% per NAR study)

Keeps REALTORS<sup>®</sup> in the loop with Builders and Buyers

- Agents can note efficiency as a distinguishing feature
- Agents can be more conversant with green builders

Appraisal of Certified or Improved Homes difficult w/o comps

- Certified homes often not represented as such in Resale
- Cannot search MLS for 'sold' homes w/Energy features

Consistent approach helps agents stay in synch across NYS

# *Consumer Outreach, Incentives, EE Financing*

- **Ads prompt consumers to improve Efficiency**
  - Contractor ads co-op with NYSERDA or LIPA on TV, Radio
  - NYSERDA, LIPA, and other websites
  - Utility company distributes efficiency info to clientele
- **Incentives Available through NYSERDA, LIPA**
  - Green Jobs/Green NY Home Assessments/Audits
  - Home Performance w/ENERGY STAR; Assisted HP w/ES
  - LIPA Green Homes; Cool Homes
- **Financing more accessible (GJGNY loans, etc)**

# *Process Developed by Working Group*

- Statewide Working Group comprised of NYS Real Estate Professionals & related professionals from Construction, Mortgage Origination and Energy/Building Science Disciplines
- Base Assumptions from Working Group:
  - 1) Keep it simple, most common certifications, ratings, attributes
  - 2) Homeowner, not REALTOR<sup>®</sup>, “owns” data – data should be verifiable, documented
  - 3) Agents need access to education on Energy Efficiency topics
- Group Developed a Two-Part Approach
  - 1) Energy Efficiency Profile (EEP): 1-pg data sheet to take along to Listing Appointment, or fill out as electronic “.pdf” file
  - 2) EEP can attach to the listing via scan, with search field to locate those listings which feature an EEP attachment

# Take out the data sheet to follow along with the next section

**Certification:** communicates a home has qualified as Energy Star, LEED, or other standard

**Rating:** Home was graded on a comparative scale, **Home Energy Rating System (HERS)**, or other numeric or letter scale

**Comprehensive Audit:** Assessment of the home's air leakage, insulating properties, HVAC performance & more using technicians certified by, and using guidelines of, the Building Performance Institute

**Attributes:** Equipment or features in the home that contribute individually or inherently to energy efficiency

**ENERGY EFFICIENCY PROFILE**

FOR ADDRESS: \_\_\_\_\_ MLS# \_\_\_\_\_

**CERTIFICATION (obtain copy of certificate or verification):**

☐ ENERGY STAR VERSION: \_\_\_\_\_

☐ ENERGY STAR INDOOR AIR PLUS

☐ LEED for Homes LEVEL: \_\_\_\_\_

☐ National Green Building Standard LEVEL: \_\_\_\_\_

☐ US DOE Builder's Challenge

☐ Other TYPE: \_\_\_\_\_

**RATING (obtain documentation):**

☐ HERS Index \_\_\_\_\_

☐ Other Score & Type \_\_\_\_\_

☐ COMPREHENSIVE HOME ENERGY ASSESSMENT/AUDIT PERFORMED BY BPI\* CERTIFIED TECHNICIAN? YEAR? \_\_\_\_\_

\*Technicians performing energy assessments as assigned by one of the major program sponsors in NYS (NYSERDA, National Grid, LIPA, etc.) are required by the sponsor to be certified by the Building Performance Institute (BPI). Performance of a home energy assessment alone does not indicate recommended improvements were completed.

## ATTRIBUTES (check all that apply):

☐ Air Sealing ☐ Documentation Collected?

☐ ENERGY STAR Central AC ☐ Documentation Collected?

☐ ENERGY STAR Doors ☐ Documentation Collected?

☐ ENERGY STAR Furnace ☐ Documentation Collected?

☐ ENERGY STAR Water Heater ☐ Documentation Collected?

☐ ENERGY STAR Windows ☐ Documentation Collected?

☐ Ground Source Component(s) aka 'Geothermal' ☐ COMMISSIONING REPORT Collected?

☐ Instantaneous Water Heater ☐ Documentation Collected?

☐ Insulation ☐ Walls List R-Value: \_\_\_\_\_ ☐ Attic List R-Value: \_\_\_\_\_ Type(s): \_\_\_\_\_

☐ Low E Windows

☐ Low Flow Faucets/Aerators

☐ Low Flow Showerhead (s)

☐ Low Flow Toilet (s) # \_\_\_\_\_

☐ Solar Component(s) ☐ Documentation Collected?

☐ Programmable Thermostat

☐ Windmill

☐ Other Description: \_\_\_\_\_

**APPLIANCES:** (This section should be used to indicate ENERGY STAR appliances in this listing to be included (conveyed). Mark YES if included)

Refrigerator \_\_\_\_\_ Dehumidifier \_\_\_\_\_

Dishwasher \_\_\_\_\_ A/C Unit (not central Air) \_\_\_\_\_

Clothes Washer \_\_\_\_\_ Other: (Specify) \_\_\_\_\_

Seller: \_\_\_\_\_

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

Seller: \_\_\_\_\_

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





# *Energy Efficiency Profile Overview: Part 1*

## ***CERTIFICATIONS***

- **NEW YORK ENERGY STAR HOME** – built to be significantly more energy efficient than conventionally built homes; NY Energy Star Homes are either Version 1 (built during or prior to 2006), Version 2 (built 2006 to 2010/11), Version 2.5 (transitional period 2011, may overlap until July 2012) or Version 3 (after NYSERDA’s roll out to contractors, projected for January 2012). Documented by receipt of an NY ENERGY STAR Certificate from NYSERDA that the home is NY ENERGY STAR qualified.
- **INDOOR AirPLUS** is a special ENERGY STAR Certification encompassing enhanced air quality measures. Documented by an ENERGY STAR Certificate from NYSERDA.
- **LEED for Home** – Leadership in Energy and Environmental Design a comprehensive “green” standard by which points in several categories including energy, water and more enable a home to reach LEED levels of silver, gold etc. LEED’s Energy Efficiency checklist requires the home performance to exceed conventional homes. A ***certified*** LEED home (not just pending LEED application for certification) will at least receive correspondence or an email of achievement.

## *CERTIFICATIONS, continued*

- **National Green Building Standard™** a residential green building rating system approved by American National Standards Institute (ANSI). Certification is through National Association of Home Builders (NAHB), which issues a Certified Green Home Certificate upon review and verification of the NAHB application process. There are four green certification levels for homes available in the Standard – Bronze, Silver, Gold, and Emerald.
- **US DOE's Builders Challenge** is a voluntary program which issues an Energy Smart label to homes achieving 30% efficiency over standard code (also contains a rating of 70 or lower as part of label, that can in addition be recorded under "Ratings: Other" on the listing sheet)

INSTRUCTIONS: CHECK THE BOX NEXT TO THE APPLICABLE CERTIFICATION. BE SURE TO NOTE THE VERSION ,OR LEVEL , OF THE CERTIFICATION NEXT TO THE FIELD AS INDICATED, AND COLLECT A COPY OF THE DOCUMENTATION.

## *Energy Efficiency Profile Overview: Part 2 RATINGS*

- **HERS INDEX**– The Home Energy Rating System (HERS) Index is a scoring system established by the Residential Energy Services Network (RESNET). It compares homes to a “HERS Reference Home”, which is a standard home built to 2004 Int’l Energy Code that holds a score of 100. At the “zero” point of the scale is a “net zero energy home” which creates as much or more energy than it uses. The lower a home's HERS Index, the more energy efficient it is in comparison to the HERS Reference Home. Each 1-point *decrease* in the HERS Index corresponds to a 1% reduction in energy consumption compared to the HERS Reference Home. A 1-point *increase* over 100 means a 1% increase in consumption. \*HERS scores older than 2006 are not Index scores, use “Other” box.
- **OTHER** - As of September 2011, the HERS Index is the most widely used rating or “scoring” tool, however several pilots and incentive programs underway will issue scores that may incorporate similar home data as gathered in the HERS Index, calculated against a set of “normalized” conditions which create a baseline. Future home ratings in NY may include the US Dept of Energy Home Energy Score, Energized Home score in Westchester, Remodel with Energy Star on Long Island, and others.

INSTRUCTIONS: CHECK OFF THE APPROPRIATE CHECKBOX , ALSO ENTER ACTUAL SCORE IN SPACE PROVIDED. USE “OTHER” LINE FOR HERS SCORES **OLDER** THAN 2006

## *Energy Efficiency Profile Overview: Part 3*

# ***COMPREHENSIVE HOME ASSESSMENT/AUDIT***

- **COMPREHENSIVE HOME ASSESSMENT or AUDIT (CHA)**, also referred to as an energy audit, identifies areas where energy efficiency, comfort and safety upgrades can be made. The BPI certified contractor or technician completes a visual inspection of the living space, attic, basement (or crawl spaces), and performs a number of tests using special diagnostic equipment such as a blower door. The blower door test measures how much air is leaking out of a home. Health and safety tests are also performed at the time of assessment to ensure that the major combustion appliances (furnace, boiler, hot water tank, stove) are operating safely.

INSTRUCTIONS: CHECK OFF THE CHA CHECKBOX IF THE AUDIT HAS BEEN PERFORMED, INCLUDE YEAR PERFORMED. COLLECT COPY OF RECEIPT, OR CONTRACTOR LIST OF RECOMMENDATIONS- OR SIMILAR DOCUMENTATION THAT TEST WAS COMPLETED (not just scheduled). NOTE THAT AN AUDIT COMPLETED DOES NOT IMPLY THAT ANY IMPROVEMENTS WERE MADE, AND CONDITIONS MAY HAVE CHANGED IN THE HOME SINCE THE TIME OF TESTING. IF RECOMMENDED IMPROVEMENTS WERE COMPLETED, AGENT MAY WISH TO COLLECT DOCUMENTATION TO THAT EFFECT AND NOTE ITEMS IN “ATTRIBUTES” (AIR SEALING, INSULATION, and/or OTHER, DEPENDING ON WORK DONE)

# *Energy Efficiency Profile Overview: Part 4*

## **ATTRIBUTES**

- **Air Sealing, Insulation, Programmable Thermostat** – may have taken place in conjunction with an energy audit recommendations, or separately. Even if installed as “do-it-yourself” per homeowner, agent should collect copies of receipts or documentation and information about materials, R-values etc. from the homeowner. A CHA may be helpful in determining status in the absence of verifiable measures.
- **ENERGY STAR Components and Appliances**– can be documented via detailed Energy Guide labeling whereby ENERGY STAR logo is indicated (not just logo alone), receipts, or model numbers can be entered into manufacturer’s websites in most cases to verify ENERGY STAR status of the product. See [www.energystar.gov](http://www.energystar.gov)
- **“Geothermal”, Solar, Wind Components** – Should be documented including descriptive manufacturer’s data, installers data, and testing reports. Ground source components should specifically possess a Commissioning Report provided to the owner by the tester.
- **Other** – If using this category, agent should name the item and collect proper verification, such as receipt and product labeling with regard to energy use.

## *Energy Efficiency Profile Overview*

### *WRAP UP*

If the Energy Efficiency Profile is used, check to make sure signature and date are included. THIS FORM IS PART OF THE LISTING if used. It is to be scanned as an attachment/upload to the listing when used, and the agent indicates the existence of the form by entering “YES” (Y) in the Search field: ENERGY EFFICIENCY PROFILE: Y/N

Documentation collected is to be included for scanning/attachment to the listing

If you are searching for certified and/or rated homes for sale, or homes with the attributes described within the EEP, you can use the field above to filter for homes that have a YES (Y) response, thereby indicating listings with attached Energy Efficiency Profiles

The Energy Efficiency Profile form is voluntary, and may or may not be used depending on the home’s specific information

## *Energy Efficiency Profile Overview*

### ***ADDITIONAL RESOURCES***

1. Glossary (attached, or available as separate file – see your MLS Administrator)
2. NYSERDA [www.nyserda.ny.gov/residential](http://www.nyserda.ny.gov/residential)
3. Building Performance Institute [www.bpi.org](http://www.bpi.org)
4. SONYMA [www.nyhomes.org/Home/Buyers/SONYMA](http://www.nyhomes.org/Home/Buyers/SONYMA)
5. Energy Efficient Mortgage [www.hud.gov](http://www.hud.gov) (tip: search site for “energy efficient mortgage”)
6. ENERGY STAR [www.energystar.gov](http://www.energystar.gov)
7. RESNET (Residential Energy Services Network) [www.resnet.us](http://www.resnet.us)
8. MLS Energy Project (on Facebook)  
[www.facebook.com/pages/MLS-Energy-Project/192403480780679](http://www.facebook.com/pages/MLS-Energy-Project/192403480780679)

## 1. Certifications

**ENERGY STAR Home:** New York ENERGY STAR qualified homes are built to New York ENERGY STAR guidelines as issued by the EPA and NYSEERDA. Documentation includes the Energy Star Certificate of Authenticity issued by NYSEERDA, and/or sticker affixed to breaker box or plaque affixed to the home. Energy Star guidelines were revised over recent years; therefore indicate under which version of the standard the listed home was built. Generally homes built during and prior to 2006 are Version 1; homes built between 2007 and April 2011 are Version 2; homes built late 2011 to July 2012 may be Version 2.5 (transition); and homes completed after July 2012 will be under Version 3 standards. However, allowances for transitional periods provide that some homes that obtained permits under the prior version, but were not completed until after the next version commenced, were qualified under the prior version. If unsure consult the home's documentation, permits, or contact the builder to obtain verification.

**ENERGY STAR Indoor AirPlus:** An enhanced ENERGY STAR built home which includes, in addition to having met ENERGY STAR standards, over 30 additional design and construction standards having to do with air quality. Indoor AirPlus is evidenced by an Indoor AirPlus sticker affixed next to the ENERGY STAR sticker in the home.

**LEED for Homes** Leadership in Energy and Environmental Design a comprehensive “green” standard by which points in several categories including energy, water and more enable a home to reach LEED levels of Silver, Gold, or Platinum, depending on points gained and completion of certain checklist items as verified upon completion of construction by a LEED Green Rater. Documentation for a *certified* LEED home (not just pending LEED application for certification) should include at least the correspondence or an email of achievement from the USGBC (US Green Building Council) if a final certification packet has not yet been received. Note, LEED may be applicable to a home designed as LEED new construction; or a substantially “gut” remodeled home remodeled to conform to LEED criteria.

**National Green Building Standard (NGBS):** ICC 700 National Green Building Standard is a green building rating system developed jointly by the National Association of Homebuilders and the International Code Council, and approved by the American National Standards Institute. NGBS is a point based system, documented by certification to the standard as provided by NAHB () Research Center, and has four threshold levels: Bronze, Silver, Gold, and Emerald.

**Builders Challenge:** Sponsored by the U.S. Department of Energy, homes achieving a 70 or lower on the E-Scale, or at least A 30 percent improvement in energy efficiency over a typical new home. Evidenced by a “Meets Builders Challenge” Energy Smart Label affixed to the breaker box. Can co-exist with other Certifications – Challenge label will be affixed next to other label.

**Other:** The above certifications are currently available in New York State, however new versions or standards may develop from time to time. If encountering a certificate not listed above, obtain copy of certificate and contact info for the 3<sup>rd</sup> party verification source. Be sure to distinguish a builder's BRAND name from a certification. Do not check the “other” box to denote a BRAND, rather, use listing remarks to note a brand. A certain brand of home may contain energy efficient *features* which can be reflected on this profile, without being “certified” by a third party as having met a building standard.

## 2. Ratings

**HERS Index** :The HERS Index is a scoring system established by the Residential Energy Services Network (RESNET) in which a home built to the specifications of the HERS Reference Home (based on the 2004 International Energy Conservation Code) scores a HERS Index of 100, while a net zero energy home scores a HERS Index of 0. The lower a home's HERS Index, the more energy efficient it is in comparison to the HERS Reference Home.

**HERS (prior to 2006)** Less common, however HERS scores obtained prior to 2006 can be recorded under the “other” checkbox because they were calculated on a slightly different scale than the HERS Index.

**Other:** Other scoring systems are under development regionally & nationally (e.g. the US DOE's Home Energy Score (HES); EnergySmart Home Scale (based on HERS, used with Builder's Challenge homes).

## 3. Comprehensive Home Energy Assessment (Audit) CHA :

**The Home Performance with ENERGY STAR program** offers *free or reduced-cost home assessments*, also referred to as an energy audit, to income-eligible owners of 1- to 4- unit residential buildings. A participating Building Performance Institute (BPI) Accredited contractor will provide a home assessment to identify energy saving opportunities.



**1. Attributes**

**Air Sealing:** to maximize energy savings, air sealing should be performed prior to insulating, to reduce accidental airflow into and out of the house. Areas that are typically sealed include attic, basement, utility penetrations, etc.

**ENERGY STAR qualified features such as: Central Air Conditioner, Doors, Windows, Furnace and Water Heater:** indicates that the item was manufactured to meet Energy Star standards set for each specific item. Can be verified by the label appearing on the item, or if label not found see copy of receipt, manufacturer’s website or data sheet, or can look the model number up on energystar.gov

**Ground Source Components:** may be referred to as geothermal; closed loop (continuous loop of piping buried underground) or open system (water discharged through separate well into pond, stream, or underground body of water). Either method will utilize a “ground source heat pump” inside the home. These systems must be commissioned and a copy of the commissioning documentation must be provided in order to check the box on the form.

**Instantaneous Water Heater:** Instantaneous, also called “Demand” water heaters, heat water directly without the use of a storage tank; generally installed close to the site of the water use.

**Insulation:** If insulation exists in walls or attic check appropriate box(es). If R-value is documented through receipts, builder’s or installer’s documentation, etc., please note where indicated. In type, indicate if it is blown-in, batts of fiberglass or mineral (slag) wool, or cellulose, polyurethane foam, etc.

**Low E Windows:** Low-emissivity (Low-E) coatings on glazing or glass control heat transfer through windows with insulated glazing. See copy of receipt, manufacturer’s website or data sheet, or product label on window for further info.

**Low Flow Faucets/Showerheads/Aerators:** A faucet aerator is often found at the tip of modern indoor water faucets. Without an aerator, water usually flows out of a faucet as one big stream. An aerator spreads this stream and provides equivalent force with less water. This helps save water and reduce splashing. The amount of water passing through the aerator is measured by Gallons Per Minute (GPM); the lower the GPM the more water the aerator will conserve.

**Low Flow Toilet:** Since 1992, U.S. law has mandated that new toilets sold in the United States be low-flow or low-flush, which means that they consume no more than 1.6 gallons (6 liters) per flush.

**Solar Components:** state type, such as Flat-plate solar collector (panels) or Evacuated tube solar collector (tubes) for hot water, or Photovoltaic “PV” for electricity.

**Programmable Thermostat :** offers pre-programmed settings to regulate the home's temperature in both summer and winter. When properly programmed, these save energy by turning heating and cooling equipment off when the house is unoccupied.

**Windmill:** also known as wind turbines, used as a means for producing electricity. Verify availability of the manufacturers and installers data sheets and copy of owner's receipt and/or installation document.

**Other:** Any verifiable, documented energy efficiency related attribute not listed above, such as:

- Energy Recovery Ventilation Systems** provide a controlled way of ventilating a home while minimizing energy loss.

- Insulated Doors, Windows, etc other than ENERGY STAR.** Collect manufacturers data sheet or see product label

- Green Roof:** Also known as “**living roof**”, serves purpose such as absorbing rainwater, providing insulation, helping to lower urban air temperatures and combat heat island effect

**ENERGY STAR Household Appliances such as Refrigerator, Dishwasher, Clothes Washer, Dehumidifier, AC Unit or OTHER:** : indicates that the item was manufactured to meet Energy Star standards set for each specific item. Can be verified by the label appearing on the item, or if label not found see copy of receipt, manufacturer’s website or data sheet, or can look the model number up on energystar.gov

Click below to view a mock listing appointment conversation about the Energy Efficiency Profile

