

February 8, 2011

Dear Program Partners,

Since first posting the ENERGY STAR for Homes Version 3 guidelines in April 2010, EPA has continued to clarify and refine various aspects of the program requirements, primarily in response to partner feedback. The purpose of this revision process is to be responsive to partner questions, to disseminate policy changes in a consistent manner, and to adapt the program as needed for success.

'Revision 02' to the Version 3 guidelines has been posted to the [ENERGY STAR web site](#) and becomes effective on April 1, 2011. As part of this Revision, all major program documents have been updated. A Revision 02 Version Tracking Document, containing all of the specific changes in this Revision has also been created and a Revision 02 'highlights' document is attached to this message. EPA strongly encourages partners to review these documents. By way of summary, the most substantial changes in Revision 02 include:

- Adjusting the timeline such that v2.5 is mandatory for most homes permitted after April 1, 2011 instead of January 1, 2011.
- Excluding most basements from Size Adjustment Factor.
- Aligning exceptions to the window performance and insulation requirements with the exceptions included in the 2009 IECC.
- Explaining the process for using the equivalent U-factor and UA alternative compliance paths.
- Modifications to each of the checklists.

We encourage you to participate in the Revision 02 webinar that has been scheduled for February 22 from 2-3:30pm Eastern. Register at <https://www1.gotomeeting.com/register/374156824>.

Required Training Elements: A new EPA [web page](#) dedicated to training requirements and resources is now available. To be eligible to label homes under the ENERGY STAR Version 3 guidelines, the builder, Rater, and HVAC contractor must all have completed required training. In conjunction with key program stakeholders, EPA has developed training curricula that have already begun to roll-out to partners.

Raters and Field Verifiers:

All Home Energy Rater partners are required to take ENERGY STAR for Homes Version 3 training through a RESNET-accredited Training Provider to be eligible to qualify homes under the new guidelines. Training will be available in March and raters must complete the required training by January 1, 2012 to continue qualifying homes as ENERGY STAR. This requirement applies to all existing ENERGY STAR rater partners, as well as any new raters who sign onto the program in the future. Note that in consultation with RESNET, EPA has expanded this training requirement to include field verifiers who are doing inspection and testing associated with ENERGY STAR qualified homes.

RESNET has posted the [list of accredited Training Providers](#) eligible to offer ENERGY STAR Version 3 Rater Training. The training will cover a range of topics that raters and field verifiers will need to know to qualify homes under ENERGY STAR Version 3, including the ENERGY STAR Reference Design Home, Benchmark Home/Size Adjustment Factor, as well as technical details for completing the required ENERGY STAR Inspection Checklists (Thermal Enclosure, Water Management System, and HVAC Quality Installation). ENERGY STAR Version 3 training will count towards RESNET required Professional Development credit.

Builders:

Builders will be required to have a fully-active partnership with ENERGY STAR, including completed ENERGY STAR Orientation training, to be eligible to label homes under the ENERGY STAR Version 3 guidelines. The self-guided, online ENERGY STAR Orientation training will cover Version 3 guideline information, partner responsibilities, and available resources. This training, estimated to take an hour to complete, is now available at www.energystar.gov/mesa. Builders will be required to complete the online

course by the end of 2011 as a condition of continued partnership with the program. Also, beginning in 2011, all new builders seeking to partner with ENERGY STAR will need to complete the training before their partnership is activated. One company representative per builder will be required to complete the course; however, additional representatives are encouraged to also complete the training.

HVAC Contractors:

EPA is currently working with representatives from the HVAC contractor industry to help ensure that there are a sufficient number of companies qualified to deliver the HVAC Quality Installation requirements of the new guidelines. Only contractors who have demonstrated the requisite training/experience and have been credentialed by an EPA- recognized Training and Oversight Organization will be eligible to install HVAC systems in ENERGY STAR homes qualified under the Version 3 guidelines. Builder and rater partners should encourage their HVAC contractors to ensure that they meet these requirements. More details on HVAC contractor training are available at www.energystar.gov/newhomesHVAC.

EPA Support Resources: There are several new resources available from EPA to help partners transition to the new guidelines:

- The Technical Resources pages on the ENERGY STAR web site have been significantly reorganized. We hope that this more easily connects you with the new technical information that you will need to know. Please visit www.energystar.gov/newhomesguidelines to view these updated pages.
- A recording of the [Version 2.5 Guidelines webinar training](#) has been posted. This recording includes updated information related to the Size Adjustment Factor and Benchmark Home Size methodology.
- A [new schedule of webinars](#) for the first quarter of 2011 has been posted. This schedule includes several webinars specifically on knowledge and skills necessary to succeed with the new Version 2.5 and Version 3 guidelines.

In addition, EPA will soon release a set of comprehensive guidebooks that will provide an item by item review of each checklist requirement, including diagrams and pictures of correct and incorrect construction details. These Guidebooks will be posted to the ENERGY STAR web site on March 1, 2011. Guidebooks will be available for:

- Thermal Enclosure System Rater Checklist
- HVAC Quality Installation Rater Checklist
- Water Management System Builder Checklist

Please contact us at energystarhomes@energystar.gov if you have any questions. Thank you for your work promoting ENERGY STAR.

The ENERGY STAR for New Homes Team