

# Report on NEHERS Strategic Planning Meeting 9/17/09

*(Served as the September 2009 Board Meeting)*

**Below are the ideas generated at the NEHERS Strategic Planning meeting in September. Priorities receiving two or more votes by Board and attendees at Strategic Planning meeting are in \*RED\* and have the number of votes received in parentheses ( ).**

## NEHERS mission

- Review and update mission (need committee)
- Sponsor regional and national conferences for greater visibility
- Focus efforts on building science and educational services

## Structure and makeup

- **(9) Need more staff - hire an Executive director**
  - Staffing review / add staff - tasked to generate revenue
- (1) Formalize relationship with RESNET and BPI: Become RESNET chapter, authority like QA and oversight of local providers.; allow us to have better control over QA
- Participation on our Board
  - (1) Recruit BPI and RESNET member on BOARD;
  - Give past president position on the board to create continuity of leadership
  - (1) Review membership categories; [Building science core: Energy star raters one group; BPI cert, another group, green raters another troop;] broader trainer designation (not just rater trainers);
  - Add Program evaluators to membership (Dottie Conant, Glenn Haynes, etc)
  - Need more board members to represent individual building performance members to reflect current membership
- NEHERS should become a rating provider
- Create a policy group for political outreach and networking
- BPI is certifying and NEHERS is not. We have no RESNET board members who are also on BPI board.
- Create topic managers for updates/information dissemination on codes, EEMs, and other topics
- Exec board meet separately prior to monthly meetings so board meetings can discuss important topics
- Pole membership for best conference call time and date (other than Wednesday)

## Training and education

- **(9) Build on training income that is our biggest revenue stream.**
- **(4) Offer more types of trainings**
  - **(2) Train QA designees to offer consistency and better QA/QC across region**
    - Develop a QA manual
    - Train QAD's and best practices for QA; standardization on protocols?
  - **(2) Building science training and workshops for architects, HVAC, building inspectors, insulators, etc. \*\*\*Offer appropriate CEUs)**

\* Number of votes by Board is shown in parentheses ( )

- (2) Offer a train-the-trainer class for experienced raters to become NEHERS rater trainers
  - (2) Increase # NEHERS rater trainers to cover basic and advanced rater trainings and other types of trainings
    - Create well defined criteria for entrance and “certification” as an NEHERS trainer;
    - Trainers may have to become Trainer members to do NEHERS trainings
- Advanced trainings approved by RESNET - a path for senior raters
- Refresher courses for HERS raters (may be required by RESNET) and for low volume raters (need to solidify basic rating skills)
- Updates for new and changing initiatives (code, ESTAR, tax credits, etc.)
- Help members meet RESNET’s new CEU requirements
- Offer marketing training and assistance to members
- Multi-family rating trainings
- Explore BPCA model for offering trainings (collaborate?)
- Green Rater training, BPI trainings
- Curriculum Development
  - (1) Develop a curriculum for building science training to sell or license our curriculum (compensate developers)
  - (1) Develop curriculum for raters to present to communities (on HERS, EEMs?)
  - Develop and create concentrated building science curricula, license for people to take on the road (BPI curriculum is being purchased nationally). BPI affiliates might be offering it. Demands from feds - room for opportunity NEHERS has a great niche especially with building officials who will be held to 90% compliance. (building officials are busy but they will be more funds and therefore funded mandates)
  - License the curriculum CSG and VEIC developed; would help expand number of in-region certified trainers
- Have a monthly conference call specifically to brainstorm about our training opportunities (collaborate with other groups)
- Send our trainers to more locations in the country (would make it worth it to become an NEHERS trainer)
- Administrative
  - Offer CEUs for our trainings (and monthly calls) for members of different organizations (e.g., AIA, Building Inspectors, ASHRAE)
  - Have more permanent training locations to save administrative costs money
- NOTES: Our manual has served as a reference point for best practices and guidelines. Community colleges are desperate for trainers. .

### Quality Control

- (7) Role for Alliance to educate and sell a QA process, manual they developed, and training to meet the needs of state programs. Note: This will require an infrastructure to meet these goals; could generate a lot of revenue.
- (1) Create a QA coop
  - Offer QA services in region

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- Utilities, interested in a provider for their QAD.
- RESNET does 2% field QA of providers annually and 100% of providers - documentation QA review; could Alliance subcontract for this?
- RESNET did an RFQ for this and there are companies doing this. Note: RESNET's QA on providers shouldn't substitute for QAD on ratings.
- Formally evaluate our regional QA/QC effectiveness
- Develop NEHERS Infrastructure for regional QA work
  - (1) Share program qualifications and approaches between states; QA/QC; could become an evaluation exercise
  - Seed money may be needed from utilities and they might be interested
  - Formally evaluate consistency of ratings among providers and independent raters, as RESNET or EPA rarely checks or enforces the rules. There may be a systemic problem if QAD's do their own organization, so how are we to ensure 3rd party review?
  - Consider collaboration among providers, e.g., MaGrann has a 3rd party to do QA on themselves- they essentially go through the process twice, which is extremely valuable for both parties. Mark Hutchins (CSG) does QA on CSG's raters - it seem to work very well.
  - Alliance may be able to provide a service for QA others can use and it could become a standard.
- Develop other approaches to quality control in the region
  - Assess states' QA standards and compare to other states and document/share; recommendations; enforcement approaches?
  - BPCA - trains QADs; BPCA says QA for their raters is costly
  - Discuss what kind of a budget or infrastructure would be needed to really regulate itself well and be sustainable and credible
  - Share what programs require for QC in different states: more and more programs are now pointing to QA process - where do they go to get it?

### Targeted Networking

- Provide support to other organizations which enhance the Alliance - sponsor conferences and other public events (RESNET, ACI)

### Region wide projects

- **(3) Provide opportunities for info sharing between organizations and states**
  - Offer NEHERS conferences - business focused. Topics: business; new technologies; funding opportunities, future of energy star, code issues, financing and mortgages, trainings, train the trainer, Program updates, checking in with raters
- (1) Cooperative marketing across the region to benefit raters and organizations; careful on approach so problems don't come back to haunt us
  - Educate people to look for HERS index; market more users for HERS
  - Launch a revitalization of EEMs in a coordinated manner across the region to lenders, realtors, and homeowners
  - Cooperatively market EEMs and EEM trainings.
  - Collaborative outreach to constituent groups
- (1) Establish a mentoring program to ensure ratings are done the correct way.

- Do multi-family projects - opportunities, protocols, case study sharing - seek funding?
- Connect state organizations to NEHERS. REPA in NH, Maine assoc of building efficiency professionals. They struggle with the same issues and we could provide something they can't.
- Reach out to builders, HVAC, building inspectors, building techniques

### Member Outreach

- (1) Create a reward for members for bringing in new members, getting people to trainings, etc.
- Seek greater support from more utilities (NY, NJ, PA, NH, ME etc., CT) either through dues or special support for our projects. What can we offer them or work on together?
- Widen the scope of our membership (see 2009 Membership Strategy)
  - (1) Recruit NE / mid-Atlantic Providers to be members
- Help members take advantage of opportunities in the marketplace that will benefit our members
- Host a networking meeting with other groups, such as NESEA, BPI, RESNET, and ACI, or try to get our members to be on their boards or attend their board meetings

### Member services

- **(3) Provide business model help for members; use stimulus funding to help; provide a template**
- **(3) Determine needs of independent raters**
  - Further develop an approach to create providerships and support for independent raters, which make up 85% (guessing) of our training attendees
- (2) Update templates in our Rater Training Manual
- (1) Create a two-tiered rater membership:
  - Tier 1 for raters with a provider who have in-house or local QA
  - Tier 2 would include QA services for independents who don't have a local provider
  - NEHERS would provide oversight of practices of independent providers
- Provide resources to a wider variety of building science professionals
- Enhance member services for Program Members to get them more involved
- Help raters develop value added skills and knowledge of other specialties (Passivhaus, deep energy retrofit, zero net energy, etc)
- Monthly member calls are appreciated
- Help raters diversify their services

### Website

- (1) Add a blog by topic
- Add links to tax incentive websites (TIAC), etc.
- Add counters for # of visits
- Use Google Analytics to see who is visiting
- Create consumer section for website, with consumer-focused information and links; Need to explain raters, their value as 3<sup>rd</sup> party, how different role than builders, why utilities rely on raters. Need to educate homeowner. Collaborate with BPCA
- Photos of Existing Homes (before and after)

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- Create a photo library (external to website) to share photos for members to use

**Finances, Revenues, Investments**

- (3) Get a consultant for getting NEHERS grant money
  - (3) Collaborate with states and Providers
- Create a rainy day fund with clear investment goals (in addition to money market account)
- Get more corporate sponsorships of our events and trainings
- Invest % of our manual profits towards our next manual revision
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