



NYSERDA

Delivering Energy Efficiency more Cost-Effectively with HPXML

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KEY SESSION TAKEAWAYS

- What is HPXML and why do we love it?
- How can HPXML be used to make programs more cost-effective and responsive to our customers' needs?
- What should programs know before adopting HPXML?

HPXML OVERVIEW

- BPI-2200-S-2013 Standard for Home Performance-Related Data Collection
 - Data dictionary describing all aspects of home performance work
 - Aligned w/ BEDES, RETS, BPI-2101, AI's Green and Energy Efficient Addendum
- BPI-2100-S-2013 Standard for Home Performance-Related Data Transfer
 - Data elements in BPI-2200 can be transferred from one software system to another via xml.

PURPOSE

HPXML was created to achieve goals that are critical to a growing industry:

1. Standardize terminology and facilitate the collection of higher quality data as a means to track and quantify work being completed across the residential energy efficiency industry.
2. Create interoperability between software systems to allow the transfer of home performance data across a diverse set of market actors.
3. Improve industry efficiency by reducing the costs of data collection and exchange between market actors.

USE CASES

To facilitate adoption of HPXML and reduce variation between jurisdictions, which can be costly for software providers and contractors to support, WG-5 developed several use cases that specify a set of data elements that can be collected at specific points during the implementation of an energy efficiency program (e.g. the audit, test out, QA, etc.).

- Audit
- Retrofit (Project Completion)
- Home Energy Score
- BPI-2101

Check out the HPXML Implementation Guide at: www.energystar.gov/hpxml

HPXML IMPLEMENTATION AT NYSERDA

NY HOME PERFORMANCE with ENERGY STAR

- Administering program since 2001
- Average 5,000 – 6,000 completed projects per year
- Approximately 200 active home performance contractors
- Offer 10% off approved measures (up to \$3,000)
- Offer low-interest financing options
- Partners: Conservation Services Group & EnergySavvy

BENEFITS OF HPXML

- Create an open modeling software market
- Reduce data collection burden for contractors
- Automate workscope approval through validation of standardized data
- Improve program analytics
- Export to local real estate market (BPI-2101, Home Energy Score)
- Facilitate sharing of information among multiple NY programs
 - To reduce administrative burden for contractors participating in multiple programs

CREATING A LEAN PROGRAM

- Customer engagement
- Contractor engagement
- Data requirements
- Program staffing
- Processing times
- Financing/vendor engagement

EARLY WINS: SUMMER 2014

Make it easier for customers to choose and apply for the home performance program.

Make the application process for a home energy assessment clear, fast, and simple.

Make it easier for customer to select a home contractor at the time of application.

Reduce financing approvals times

Streamline and simplify CSG workscope review submitted by the contractor

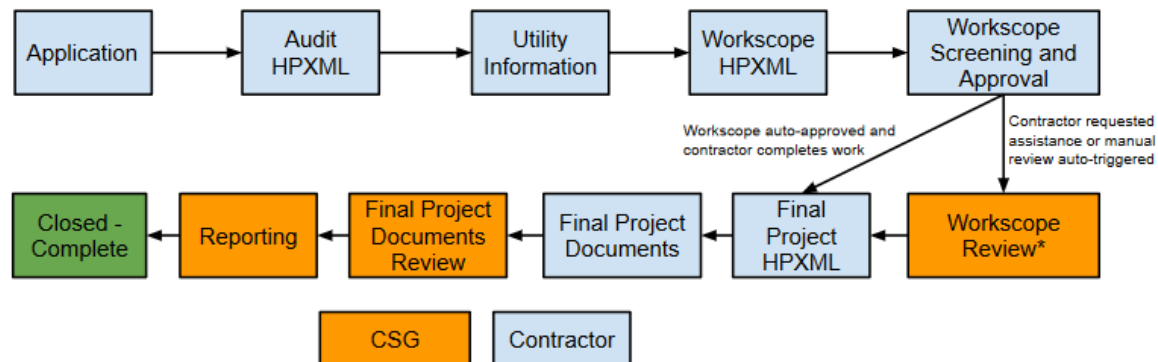
- 95% of customers move from decision to use program to an approved contract offer **within 1 week.**
- Reduce average workscope approval times from **8 days to 1 day.**
- Reduce CSG FTE's focused on approving projects from **3 to 1.**

RETHINKING OUR DATA NEEDS

- What information do we need to collect and when do we need to collect it?
 - Evaluation
 - Quality assurance/control
 - Reporting
 - Incentive calculation/program approval
- How do we make sure we are getting the information we need to meet program/QA/regulatory reporting requirements?

NEW WORKFLOW OVERVIEW

- Supports processing of all projects in Optix Manage
- Automates approvals for 85-90% of projects
- Phased roll-out over 2015
- Supports HPXML-compliant software tools



STRIVE FOR CONTINUOUS IMPROVEMENT

- Approve HPXML – compliant tools by June 1st
- Soft launch of Phase I of new workflow (June 2015)
 - Incorporate contractor feedback
- Phase out old workflow by end of 2015
- Identify and automate additional processes
 - Quality control
 - Coordination with EmPower

THANK YOU!