





















# 2013-2014 Energy Efficiency Programs HERS Rater Training Advancement Program Implementation Plan

PDF documents and/or links to web content related to new construction and emerging technologies useful to HERS raters.

**vii.** CEC work on PIER  
Not applicable

**viii.** CEC work on codes and standards  
CEC work on codes and standards underpins much of the content in new building technologies, energy efficiency building codes and green building standards. Again, the program does not specifically budget coordination with ongoing CEC work into the delivery of training materials, but coverage of codes and standards is implicit in providing meaningful training advancement for HERS Raters.

**ix.** Non-utility market initiatives  
Much of the Southern California Gas service area is part of the South Coast Resource Conservation and Development Area. Shared goals include similar missions to develop and deploy workforce education and training programs, creating “green collar” jobs, promoting the adoption of solar and renewable technologies, and utilizing educational initiatives and programs to advance green building practices. The South Coast Resource Conservation and Development Area Council consists of member Resource Conservation Districts covering the SoCalGas service area from the coast to the inland reaches of Southern California, close partnership with the National Resource Conservation Service and alliances with county government officials. Non-utility market actors include a myriad of special districts and local governmental entities, nearly all of which are advancing green building practices, educational materials and standards. By providing HERS raters with access to ongoing developments in local and regional efforts to comply with AB32 and advance highly localized green building initiatives, the HERS Rater Training Advancement Program will provide an essential link between home builders and the multi-faceted governmental elements (codes, standards, rebates, and financial instruments or incentives) that affect local new construction developments

## c) **Best Practices**

The program design incorporates many of the best practice elements from the National Energy Efficiency Program Best Practices Study<sup>1</sup>. Specific items include:

### ***Program Theory and Design***

- Anticipation of market challenges built into program design
- Program integrates statewide policy objectives into program design
- Defines and identifies key information needed to track and report throughout the program process.
- Program implementers will periodically review & update market level information about construction practices, EE market share, and measure adoption.

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<sup>1</sup> The best practices listed are identified in the *National Energy Efficiency Best Practices Study, Volume S – Crosscutting Best Practices and Project Summary*, Quantum Consulting, Inc., December 2004.  
SouthernCaliforniaGasCompany

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## *Project Management*

- Clear lines of responsibility and communication shall be set forth in the subcontracts with CalCERTS, CHEERS and BMI.

## *Reporting and Tracking*

- Program performance and participation data will be integrated into a database-driven website.
- The program utilizes web-based communications including the program website, e-forms and submittal processes, educational support services (ESS) and hybrid ESS incentive options.
- Program prospects will be contacted and tracked early to engage early adopters and drive program participation.

## *Participation Process*

- The application process and forms will be designed for user-friendly navigation and ease of use, submittal options, telephone support and classroom-based training.
- Technical assistance is provided to Raters via one-on-one customer training support.
- The program works with key stakeholders, including industry associations, to maximize reach and acceptance.
- Trade allies (CalCERTS, CHEERS, and others) will be trained in program policies and procedures so they may then assist HERS raters in selecting training modules and participation levels appropriate to their needs.
- Program funds are slated to cover program operations for the duration of the two-year cycle, throughout each year.

## **d) Innovation**

In addition to the unique partnership arrangements this program utilizes, the Program will employ several innovative technical elements. Team partner BMI will create and develop a computer/internet based learning management system (LMS) built off of standard LMS platforms already created. The SoCalGas HERS LMS will include an initial assessment test (or knowledge verifier) and the subsequent course layout will offer users distinct learning units, each containing an individual video segment or Flash presentation supporting the course's topic. Courses will contain a rich mix of text, photo, audio and video content. The framework will be flexible, and will easily accommodate expansion and updates. Lessons will also include any necessary study guide materials, online quizzes ("Check Your Understanding"), and a final exam that will serve as the basis for special recognition. This learning platform is innovative in the sense that it incorporates state-of-the-art technological elements with tested learning principles and methods to offer HERS raters the advantages of low-cost, one-stop, convenient access to Title 20, Title 24 and green building standards and information on emerging technologies, renewables, and whole-house approaches to energy efficiency. The Program couples innovative and content-rich web learning opportunities with classroom

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training and self-testing to reinforce training advancement through audio, visual and interactive cues.

The Program's approach to training is to provide content-rich, but industry-specific information. The HERS pre-qualifier will engage three variations of a virtual distance learning training package – traditional instructor led training, in-field video and game-based education.

The Program team will deploy various innovative technologies to achieve the highest learning objectives, including:

- Educational Support Services (ESS) and hybrid ESS incentive options: These increase the percentage of online training participants and provide technical expertise and assistance results that maximize the use of rebates and incentives;
- Quantifiable measurements: An integrated learning management system allows for real time data on users, access to specific information, educational roadmaps, and detailed reports on training programs taken, tests completed, videos launched and incentives achieved, and
- One-on-one participant support: Participant inquiries will be addressed in a tiered support system of (1) FAQs with answers, (2) E-mail with response within 24 hours, and (3) Dial in number for direct live support.

e) **Integrated/coordinated Demand Side Management**

This is not an Integrated Demand Side Management program.

f) **Integration across resource types**

The Program does not specifically aim to integrate across resource types (energy, water, or air quality). However, to the extent that Title 24 sets the standards for all aspects of new construction, this training program and the resulting improved quality of rating and testing will positively affect all resource types. Moreover the program plans to incorporate training materials from the California Air Resources Board and other public agencies that address Zero Net Energy Homes, and GHG emission reductions associated with green building practices. Website links to resources for green building practices and local codes and policies will include information on building-related water and air resource programs and practices such as standards for meeting water-conservation building ordinances, native and low-water use landscaping practices and new construction standards consistent with meeting the California Building Standards Commission benchmark for green buildings.

g) **Pilots**

The Program has no planned pilots.

h) **EM&V**

The utilities are proposing to work with the Energy Division to develop and submit a comprehensive EM&V Plan for 2013 - 2014 after the program implementation plans are filed. This will include process evaluations and other program-specific studies within the context of broader utility and Energy Division studies. More detailed plans for process evaluation and other program-specific evaluation efforts cannot be developed until after

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the final program design is approved by the CPUC and in many cases after program implementation has begun, since plans need to be based on identified program design and implementation issues.

## 7. Diagram of Program

# HERS Rater Training Advancement Program

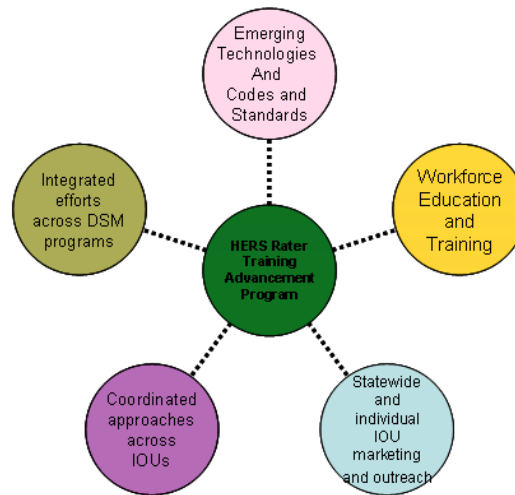
**Emerging Technologies and Codes and Standards** As advanced designs, materials, and systems are incorporated into newly constructed homes, this program will provide guidance on how to model and inspect these elements in the rating process so that they are treated correctly and consistently. Training curriculum will capture a wide range of viable technologies and building practices

**Workforce Education and Training (WE&T)** Removing cost and logistical barriers. Complies with the HERS and CHEERS training requirements. This program will contribute to statewide efforts to educate the workforce on green buildings and technologies.

**Integrated efforts across DSM programs** Trainings will identify and provide information on local, and utility DSM Programs. Trained techs will provide a single point of contact so end users can receive current DSM information.

**Coordinated approaches across IOUs** Although there is not a direct link to other IOUs, other IOUs will benefit from the advanced skill set of raters trained in this program.

**Statewide and individual IOU marketing and outreach** HERS raters will be educated in a whole house approach to coincide with and support statewide and individual IOU marketing efforts



## 8. Program Logic Model

Third party programs are an implementation channel and are included in the appropriate market segment logic models. No specific logic model for a particular third party program has been developed.