February 24 - 26, 2014

RESNET Atlanta

Program QA vs. Provider QA
What's the Difference?

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Introduction

▶ MaGrann's Business Model

▶ Historical Program Roles
- Administrator and Rater
- Administrator
- Participating Rater
- Administrator
- Technical Consultant

QA/QC – What's the difference?

▶ QA and QC are closely related but fundamentally different

- o Quality Assurance is the process of managing for quality

- o Quality Control is used to verify the quality of the output

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QA/QC – What's the difference?

PHOTO: EVERETT COLLECTION

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Program / RESNET

▶ Programs rely on RESNET to set minimum standard for Rater Participation
- o Infrastructure
- o Rule-making
- o Training
- o Providership
- o QA

But…..

Program Responsibilities

▶ Fiduciary responsibility to produce savings AND account for funding
  - o Program Funders
  - o Utility Boards
  - o Rate Payers
  - o Shareholders

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Program Responsibilities

▶ This Responsibility can justify
- o Increased standards
- o Additional QA
- o Additional training and certification
- o Additional submittals

▶ Programs incorporate QC to ensure compliance for all homes
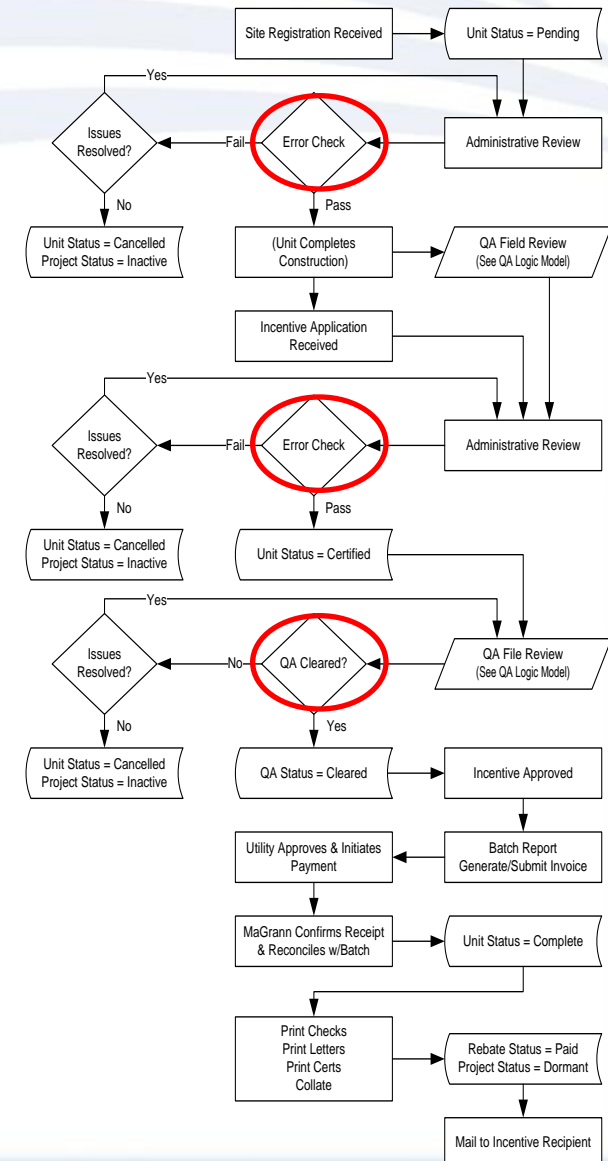
Program QA vs. RESNET QA

- The Program QAs the rater, RESNET QAs the rating
- Program QA covers savings calcs and reporting issues not always within RESNET QA limits.
  - RESNET QA is focused on errors that influence the HERS index.
  - Program QA is also interested in errors that influence program savings and customer's program experience

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Key Elements of Program QA

o Example: Sampling
- What can happen?
- What can be done?
- What are the implications?

Key elements of Program QA

- ▶ QA Program goals
  - o Set a level playing field and support fair players
  - o Identify training opportunities
  - o Monitor and achieve compliance with program requirements
  - o Mentor raters
  - o Identify raters/builders who need scrutiny
  - o Ensure savings are captured and defensible

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Report Cards

▶ QA scoring allows for consistent implementation
- Standardize results
- Increase objectivity
- Document and "digitize" results
- Can be used as a pass/fail (go/QA hold)
- Program adjust action level over time

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Report Card Example

▶ We use 1, 2, 3 points to identify minor, moderate and significant findings.

▶ If action level is set at 3 points
  ○ 3 points = QA Hold (fail)
    • 3 minor findings
    • 1 minor + 1 moderate finding
    • 1 significant finding (deal breaker)

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Report Card Example

QA Event: Final Inspection and Testing v-3

Rater:	Review Date:	Reviewer: T Smith	
Builder:	Project:	Model:	
Address:	City:	State:	Zip:
Rating File Number			

Score

QA Inspector's TERC Completed: Sections 3 & 5? — Yes – No?

QA Inspector's Rater HVAC Checklist Completed: 2.1-2.7; 3.1-3.3; 7.1-7.4 — Yes – No?

Inspection Item and Score weight: — Score

TERC Completed [M]: — Yes – No? — _____

TERC Full compliance with Sections 3 & 5 [P]: — Yes – No? — _____

TERC: Maximum 6 items Builder Verified for Sections 3 and 5 [P]: — Yes – No? — _____

Rater HVAC: Sections 2.1 – 2.6; 3.1-3.3; 7.1-7.4 completed [M]: — Yes – No? — _____

Orientation – Front Door Faces [M]: North, South, East, West — _____

Housing type [M]: SF, Duplex, TH: Inner – End, MF – Floor: 1, 2, 3, 4, 5, 6

Foundation type [S]: SOG, Crawl, BSMT, Walkout BSMT, % above grade: _____

Foundation wall insulation [S]: Type: _____, R-_____ — _____

Blown Ceiling Ins. [S]: FG - CE; R: 19, 30, 38, _____; Grade: I, II, III — _____

Program Compliance Items [P]:

- Unvented or Natural Draft heating appliances or DHW: — Yes – No? — _____
- E-Star Vent Model: _____, Nom. Cap.: _____CFM, Control: — Yes – No? — _____
- E-Star Labeled Lights: ≥ 3 fixtures: — Yes – No? — _____
- Or E-Star Labeled Lights: ≥ 50% CFLs: — Yes – No? — _____
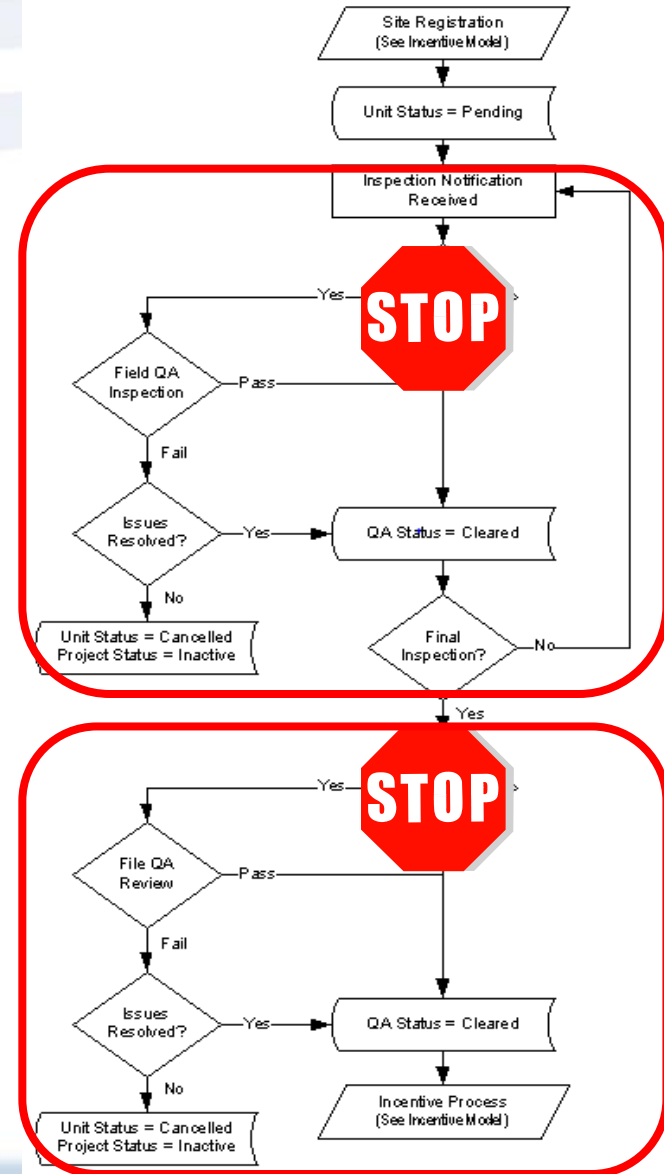
Raw Data Captured

Same as Rater Finding

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Model 1: In the Production Stream

▶ Certification and Incentive Process include a hold for QA in real time.
- o Homes with active QA issues don't get certified
- o Homes not picked for QA proceed
- o NOT PERFECT – need to manage expectations

Lesson Learned

Model 2: Parallel to Production

▶ QA during/after certification and incentive

- o Less likely to interfere with schedules
- o Homes with active QA issues may get certified
- o OK if incentive not directly related to program compliance
- o QA findings primarily used to raise the level of expertise of raters/builders/homes

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Independent and Different

▶ Not a duplicate of RESNET QA

o Our Programs have agreements with rating companies not providers

- Individuals/Companies
- Rater/Providers

o "Sweet Spot" that works for large and small rating companies, regardless of business model

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Increases Flexibility

▶ Ability to work with Providers
- Coordinate training
  - Providers involved in program training
  - Combined events
- Interpretations/messaging to raters
  - Insulation Grading
- Clarify distinction between RESNET and Program responsibilities

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Distinction Not Clear to All

▶ We have had issues…

   o Providers who wanted to use Program field QA as a substitute for Provider QA

      • Conflict of interest, at least.

   o RESNET and ENERGY STAR guidelines are used, but application is different

   o Providers can be sensitive to review of "their" files and additional obligations

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Parallel QA

▶ Programs not necessarily interested in setting standards

- Defer to RESNET / EPA guidance and judgement on technical issues
  - QA's job is to seek interpretation and mediate as needed
- Does not mean that Program QA always defers to Provider QA
- Another reason to operate in parallel with RESNET and National Programs

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Thank you!!

Questions?

Contact me

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