



## Tips & Tricks for Being a More Effective QAD

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### Agenda

- Introductions
- RESNET Standards
- Small group activities

## About Me



- HERS Rater & Trainer/QAD
- BPI Building Analyst & Proctor
- LEED AP Homes & ND
- LEED Green Rater
- EarthCraft Technical Advisor
- Educator
- Curriculum development
- Member RESNET Training & Education Committee
- Utility DSM Program Design & Implementation



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## The role of the QAD

- Maintain Rater Registry
  - CEUs
  - Equipment calibration
  - Rater status
  - File and Field Reviews
- Building files
- Complaints
- Disclosure files

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## Rater CEU Requirement

- Q: How many CEUs are Raters required to have?
- A: 18 hours of professional development every three years.



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## Equipment Calibration Log

- Q: How often does equipment need to be calibrated?
- A: "Blower doors, duct testers, and associated pressure testing instruments shall be field-tested annually for calibration. Provider shall maintain a written log of the annual calibration check for a period of three (3) years" (Section 803.9).

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## Combustion Testing Equipment

- Q: How often does combustion safety testing equipment need to be calibrated?
- A: Equipment shall be “calibrated in accordance with the manufacturers recommendations or annually whichever is the greater frequency and evidence of the calibration shall be submitted to the Rating Provider QAD” (Section 807.2).

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## Rater Status

- Q: What are the options for Rater status?
- A: Probation, Suspension, and Termination/Revocation.
  - Notify RESNET (via National Registry) of any changes to Rater status.

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## Building File Reviews

- Q: How many files must you review annually?
- A: The greater of one (1) home or ten percent (10%) of each Rater's annual total of homes for which Confirmed or Sampled Ratings were provided.

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## Building File Reviews

- 904.4.1.3.4 For of each Confirmed Rating, confirm that the values entered into the Rating Software for all Minimum Rated Features are either RESNET-defined defaults or are supported by on-site field-confirmed test data using threshold diagnostic values or actual diagnostic values. The values entered into the rating software for a Confirmed Rating are permitted to represent a Worst-Case analysis;

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## Building File Reviews, Cont.

- 904.4.1.3.5 Confirm that paper and/or electronic files, are being maintained and archived by Raters for each rating and/or unique floor plan, including the Rating Software Energy Simulation File and all supporting documentation required to validate the inputs into the rating software file (e.g., architectural drawings, threshold specifications, field data). These files shall be maintained a minimum of three (3) years;

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## Field Reviews

- Q: How many homes must you review annually?
- A: Onsite field evaluation of the greater of one (1) home or one percent (1%) of the Rater's annual total of homes for which confirmed or sampled ratings (904.4.2.1).

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## Field Reviews

- 904.4.2.6 Confirm that HERS Index scores for each home reviewed be no more than three percent (3%) (+/-) variation in the HERS Index from the HERS Index result as determined by the QA Designee. When calculating the HERS Index point variance allowed for a given Index, round down to the nearest whole Index point, with the allowable variance never less than two (2) HERS Index points.

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## "Low-Volume" Raters?

- Q: How many Field Reviews are required on a Rater who performs 3 Ratings in a given year?
- A: 1 Field Review.
  
- Q: What about a Rater doing zero ratings in a given year?
- A: 0 Field Reviews.

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## What about RFIs?

- 904.4.2.2 For Raters utilizing Rating Field Inspectors (RFI's), the QA Designee shall ensure that an annual onsite field evaluation of the greater of one (1) home or one percent (1%) of the RFI's annual total of homes for which data was collected are subject to evaluation.

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## RFI Scenario

- For example, a Rater performs 95 Ratings in a year. A RFI performs 40 final inspections with performance testing. The Rater performs 55 final inspections with performance testing. How many Field Reviews are required to be performed on the Rater and the RFI?
- Answer
  - Rater Field Reviews: 1
  - RFI Field Reviews: 1

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## Disclosure Forms

- Q: How often do disclosure forms need to be used?
- A: On every Rating and must be signed.

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## Rater Complaints

- Provider's Policies & Procedures includes complaint resolution process.
- What does this look like for you?

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## EEPs

- Q: What is an EEP?
- A: Energy Efficiency Program. So far ENERGY STAR is the only recognized EEP.
  
- Q: What is the role of the QAD in EEPs?
- A: Must track EEP homes and the QAD must use the ENERGY STAR V3 Field QA Checklist.

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## Small Group Activity

1. What is your process for the 10% building file reviews?
  - Which minimum rated features are you reviewing?
  - Do you created your own building file for comparison purposes?
2. What is your process for the 1% onsite field reviews?
  - How are you scheduling the inspections?
  - What are you verifying on site?
  - Do you created your own building file for comparison purposes?
3. How are you tracking RFIs?
4. How are you tracking/collecting equipment calibration info?
5. What are you tracking in your Rater Registry?

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Thank You!

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