**SDC 900 Task Group Meeting**

**Thursday, April 10th, 2025**

11:00 AM – 12:00 PM ET

[MEETING RECORDING](https://zoom.us/rec/share/qD4h7kxYBkmpQPSHYhcqO_1SvIJKcX_3GTo0N52QG3F1mTTztyajbIHWR1CdNnzm.JAFf7HrASZpMVKJs?startTime=1744297351000)

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**Present:** John Hensley, Laurel Elam, Leo Jansen, David Choo, Michael Arblaster, Scott Doyle

**Staff:** Katie Stewart

Meeting started at: 11:03 AM ET

The committee’s discussion focused on updates in Addendum 67, Chapter 1, provided by comments from Jerica Stacey. Several comments from Jerica were addressed, with some being universal across the entire document.

1. **Comment under Section 102.2.9.3.1 (Probation):** No changes were made to maintain clarity and simplicity.
2. **Comma Usage:** The committee agreed that the sentence is still correct without the comma, and it doesn't impact the meaning. No change was made.
3. **Capitalization of "Standards":** Some members felt that "standards" should remain lowercase unless it refers to a specific titled standard (e.g., MINHERS® Standards). It was decided to leave "standards" lowercase in the document.
4. **Use of "A" in Sentences:** The committee agreed that removing the "A" wouldn't change the meaning of the sentence, and the usage of "due process" was acceptable regardless. No change was made.
5. **Apostrophe Use (Possession vs. Plural):** A point was raised about the misuse of apostrophes when showing possession versus plural forms (e.g., "their name" vs. "names"). The apostrophe was correct in the context of possession, and no changes were made.
6. **Outsourcing Grammar and Punctuation Review:** The committee discussed the idea of outsourcing grammar and punctuation review across all standards.
7. **Consistency in Use of Acronyms (RFI):** The committee agreed to spell out Rating Field Inspector (RFI) once at the beginning of the document and then use the acronym throughout. This approach aligns with best practices for acronym usage in formal documents.
8. **Consistency in Punctuation and Formatting:** The committee agreed to accept the change to make punctuation and formatting consistent, particularly regarding slashes and acronym usage.
9. **Approval and Denial of Applications:** The language regarding "approve the application and deny the application" exists in **103.3.5** and was copied correctly. The oversight was in the addition of the blue text. It was identified as an editorial mistake on the committee's part but was not seen as needing further review or a formal re-circulation.
10. **Clarification of Editorial Changes:** The committee discussed whether the inclusion of the missed language was significant enough to warrant a more formal action. It was decided to label the change as "editorial clarification". The committee accepted the addition without requiring the document to go back out for additional review. The final decision on whether this constitutes a substantive change or not was left to Rick Dixon for final review.
11. **Purpose of the Policy on Transfer of Rating Records:** The committee discussed the policy's purpose to allow builders to complete projects if a rating provider is unable to finish due to unforeseen circumstances. The goal is to enable a new rater to use the previous rater’s data without penalizing the builder.
12. **Clarification on Policy Intent:** Elliot Seibert raised concerns that the policy might allow too much leniency. Leo Jansen shared examples where builders had no recourse when a rater couldn’t complete a rating. The committee agreed to address Elliot's concerns offline while maintaining the need for a transfer policy that balances flexibility with risk management.
13. **Draft Policy on Transfer of Rating Records:** The committee confirmed that the new policy on transfer of rating records would outline more stringent Energy Star or EPA requirements. It was noted that such a policy could include additional layers if necessary but would primarily apply to HERS® ratings.
	* The committee discussed whether the RESNET policy could reference these more stringent requirements, and the consensus was that it could, without causing issues.
14. **Policy Development:** It was agreed to include a note in the document stating that the RESNET board is considering a policy regarding the transfer of rating records, and this would likely address more stringent Energy Star requirements as needed.
	* The committee decided to maintain the language as it is now but will continue to work on refining the policy.
15. **Discussion on Elliot Seibert’s Comment:** There was some concern about how Elliot’s comment was handled as a voting member of SDC 900. The present committee members discussed the need for a better mechanism to address comments from voting members to avoid potential conflicts when these comments are presented for a vote.
	* It was agreed that John Hensley would have a conversation with Elliot to resolve the issue and provide clarity on the comment. The committee recognized the importance of ensuring all concerns are addressed before voting.
16. **102.29.2 Disclosure Discussion:** John noted that the language seemed "watered down," and did not specify the exact wording necessary at the time. The intent behind the change was discussed in past meetings, especially when eliminating the need for certain forms.
17. **Disclosure Requirements – HCO Certification and Energy Star:** The committee revisited the idea that the Energy Star program only requires disclosure to the Home Certification Organization (HCO) and questioned whether that would conflict with their changes. John questioned if there was an inherent conflict in the proposed change, suggesting that disclosure should still happen (but within the software model) and then be transmitted to RESNET. This would remove the need for a paper disclosure but still allow the process to remain compliant.
	* The committee noted that this would require significant changes to both the software systems and RESNET's registry, as a schema change would need to be implemented to allow for this kind of disclosure.
18. **Conflicts of Interest Disclosure:** Leo said the changes could still work if disclosure of conflicts of interest occurred within the software before generating a project ID. The system would need to prompt disclosure to ensure any conflicts were flagged early in the process.
	* The committee clarified that this disclosure language was included specifically for software flexibility. The goal was to ensure that any conflicts of interest were disclosed appropriately—either within the software model or via additional paper disclosures if required by Energy Star or in cases where ratings were done directly for homeowners.
19. **Addressing Track Builders and Paper Waste:** Scott Doyle commented that for track builders, who likely already knew the relationship between their rater and other contractors, requiring paper disclosure for every home seemed unnecessary and wasteful. John agreed but acknowledged that if a builder wanted a paper version, the second paragraph would still allow for it. Additionally, if required by Energy Star, the paper disclosure would still be mandated.
20. **Final Discussion on the Intent of the Policy:** The committee agreed to maintain the language, as it reflected the intent they had discussed earlier in multiple meetings. The goal was to clarify when disclosure should occur, whether in the software or as a paper form, depending on the circumstances.
21. **Section 106.2 Review:** It was determined that the language in 106.2 was nearly identical to the current version of the MINHERS.
	* John clarified that 106.2 pertains to rater responsibilities, while 106.3 is focused on QA (Quality Assurance) for EAPs (Energy Assistance Programs). 106.2 should focus solely on the rater's responsibilities and not involve the training of raters, which falls under the purview of the provider.
22. **Responsibility for Rater Training:** The EPA has made it clear that the HCO is ultimately responsible for ensuring that raters meet the necessary standards. Some members believed that RESNET may also be held responsible for raters once they are certified by RESNET. John noted that the comments Elliot included were not solely his own but reflected feedback from the EPA and other stakeholders, including Leading Builders of America (LBA) and RESNET board members.
	* The committee discussed the importance of being careful with how they phrase the responsibilities between the provider, rater, and RESNET to avoid confusion and potential conflicts of responsibility.
23. **Section 102.1.9 and Provider Responsibilities:** The committee recalled that Section 102.1.9 previously outlined the provider's responsibility to ensure that only properly trained and certified individuals performed inspections and tests for HERS ratings.
	* The committee agreed to reference 102.1.9 in the comments to clarify that providers must ensure their raters are properly trained and certified.
24. **Revised Language for 106.2:** The committee decided that it would be useful to explicitly state that **106.2** addresses rater responsibilities, and to mention **102.1.9** in the comment to support that providers must ensure raters are qualified for their tasks.
25. **Energy Star and Rater Qualifications:** It was emphasized that **Raters** should not ask unqualified personnel, like an RFI, to perform work they are not certified for, such as certifying an Energy Star home. This would prevent potential mistakes and misrepresentation of qualifications. Providers should hold raters accountable for ensuring that their team is properly trained and qualified, with the understanding that RESNET can discipline providers, but raters should also have direct accountability for their actions.

The committee reviewed Cindy Zeis’ comments. Cindy expressed the need to wait until the EPA has transitioned fully to electronic systems before moving forward with certain updates. This was viewed as a reasonable concern given the potential impacts on the process.

1. **Discussion on Pre-Drywall Version:** The committee discussed whether 4D is currently working on the pre-drywall version of the system. There were no updates at this time.
2. **Timeline Concerns in Updating Software and Schema:** The committee acknowledged that changes to the standard will require updates to software, schema, and checklist functionality. Cindy's suggestion that these changes need to be expedited was supported by most, but the committee agreed that the process should ideally be completed before January 1, 2026.

The committee will send Cindy’s feedback and concerns to Billy Giblin, as he may have more insight into the current progress and timeline, especially given the independent contractor status of some parties involved. Billy had previously noted that the task was taking longer than expected, so further clarification was seen as necessary,

Meeting Ended at: 11:58 AM ET