As of January 1, 2018...

Information disclosed
- Home energy report and Home Energy Score

Regulated party
- Seller or homebuilder

Time of disclosure
- At or before listing

Recipient of disclosure
- Real-estate listings, prospective buyers at open house
Including a Home Energy Score in a Home Sale is:


City of Portland HOME ENERGY SCORE
Why a Home Energy Score?

A home energy score at the time of listing will help homebuyers, sellers and owners have access to home energy use info that is credible and easy to understand.

Allows new home buyers to have insight into the full costs of owning a home and potentially qualify for additional loan products.

Supports City of Portland’s Climate Action Plan to help reduce carbon emissions.
A Home Energy Score Helps Homebuyers & Sellers

Like a miles-per-gallon rating for homes

Third-party Verified & Affordable
Single Family or Townhome
Inform and Showcase Improvements
Info on Energy Use for Buyers
Energy efficiency promotion in listings is valuable to clients: 71%

Utility bill costs are important to clients: 79%

Realtors not comfortable explaining home performance: 39%
An "Asset" Based Report

Based on assets of the home:
Home construction type, insulation levels.
Heating, cooling, and hot water systems
Average number of people living in the home
Average occupant behavior and energy use

Not based on:
Current homeowner’s behavior,
number of occupants or energy use
Program Entity Roles

US Department of Energy (US DOE)
Manages the Home Energy Score rating protocol, training requirements and quality assurance guidelines.

City of Portland, Bureau of Planning & Sustainability
Manages the City of Portland Home Energy Score program and is the official Home Energy Score Partner to US DOE.

Oregon Department of Energy (ODOE)
Manages compliance to Oregon-specific Home Energy Score requirements - Training credentials, CCB licensing, scorecard utility rates.

Earth Advantage
Implements Home Energy Score program quality assurance on behalf of City of Portland.
The ordinance applies to most* single-family homes or townhomes sold within Portland city limits.
Portland City Limits

To confirm, search www.portlandmaps.com using the site address and confirm the jurisdiction. Example of City of Portland qualifying home:
Portland City Limits

To confirm, search www.portlandmaps.com using the site address and confirm the jurisdiction.

Example of a non-qualifying home:
Homes That Are Required to Get a Score

- Single Family Home: YES
- Side-by-Side Townhome: YES
- Stacked Units /Condos: NO
Home Energy Report

Score: 4
Score with improvements*: 7
Estimated energy savings with improvements: $273 per year
Estimated carbon reduction with improvements: 20%/per year

Tackle Energy Waste Today!

Enjoy the rewards of a comfortable, energy efficient home that saves you money.

- Get your home energy assessment. Done!
- Choose energy improvements from the list of recommendations below.
  - Select a contractor (or two, for comparison) and obtain bids.
    - Check out www.energytrust.org/findacontractor or call toll free 1-866-368-7878.

Practical Energy Improvements | Complete Now or Later

To achieve the “score with improvements,” all recommended improvements listed below must be completed. Improvements all have a simple payback of ten years or less and may be eligible for mortgage financing. For a more detailed explanation of costs and payback, please get a bid from a contractor.

- **Cathedral Ceiling/Roof**
  - **Today's Condition**: Insulated Cathedral Ceiling with R-30 minimum
  - **Recommended Improvement**: Insulated Cathedral Ceiling with R-30 minimum

- **Doors**
  - **Today's Condition**: Prehung Wood Entry Door
  - **Recommended Improvement**: Prehung Wood Entry Door

- **Egress Window**
  - **Today's Condition**: Yes
  - **Recommended Improvement**: Yes

- **Herschel Full Wall Insulation**
  - **Today's Condition**: None
  - **Recommended Improvement**: None

- **Insulation in Attic**
  - **Today's Condition**: Insulation to R-4.0
  - **Recommended Improvement**: Insulation to R-4.0

- **Insulation in Exterior Walls**
  - **Today's Condition**: Insulation to R-13
  - **Recommended Improvement**: Insulation to R-13

- **Interior Finish Wall Insulation**
  - **Today's Condition**: None
  - **Recommended Improvement**: None

- **Insulation in Floors**
  - **Today's Condition**: Insulation to R-0.5
  - **Recommended Improvement**: Insulation to R-0.5 in all areas

- **Insulation in Attic**
  - **Today's Condition**: Insulation to R-30
  - **Recommended Improvement**: Insulation to R-30

- **Soffit ventilation**
  - **Today's Condition**: None
  - **Recommended Improvement**: None

- **Siding**
  - **Today's Condition**: none
  - **Recommended Improvement**: Vinyl Siding

- **Skylights**
  - **Today's Condition**: Insulated
  - **Recommended Improvement**: Insulated

- **Roof**
  - **Today's Condition**: Insulation to R-30
  - **Recommended Improvement**: Insulation to R-30

- **Windows**
  - **Today's Condition**: Insulated Low-E glas
  - **Recommended Improvement**: Double-pane, low-E glass

- **Solar PV**
  - **Today's Condition**: None
  - **Recommended Improvement**: None

You Can Do It Yourself!

Looking for low-cost ways to cut energy waste, boost your comfort and lower your energy bills? Visit the resources below to learn about easy changes you can make today:

www.energytrust.org/tips and www.communityenergyproject.org/services

- Actual energy use and costs may vary depending on occupant behavior and other factors.
- Estimated energy costs were calculated based on current utility prices ($0.11/kWh for electricity; $1.86/GJ for natural gas).
- Carbon footprint is based on estimated home energy use. Carbon emissions are estimated based on utility and fuel-specific emissions factors provided by the Oregon Department of Energy.
- Floorplan 1.5 years after the assessment date requires a new report from Reprint from www.greenbuildingregistry.com/portland to update energy and carbon information.
- This report meets Oregon's Home Energy Performance Score Standard and complies with Portland City Code Chapter 17.166.
Exemptions

• Foreclosure sales
• Trustees sales
• Deed-in-lieu of foreclosure
• Short sales
• Qualifies for sale at public auction
• In receivership
• Subject to notice of default
• Uninhabitable due to casualty or condemned
• Undue hardship
Income-Qualified Sellers

The City has funding for calendar year 2018 to fund the cost of Home Energy Assessments for sellers whose income is at or below 60 percent of median family income.
Pre-Construction Score for Code Built Homes

*Does a home listed for sale before or during construction need a Home Energy Score?*

Yes, unless the builder or home earns an EPS waiver by participating in the Energy Trust new homes program.

- Home Energy Assessors can provide builders with a "pre-construction“ Home Energy Score.
- This is done by the Assessor using information provided by the builder and from plans.
- The “pre-construction” Home Energy Score fulfills the city mandate. No additional score is needed after construction.
Two Ways to Obtain an EPS Waiver

**OPTION 1:** Verifiers obtain waivers on behalf of their builders.
- Verifiers email affidavit to Energy Trust of Oregon.
- Either for 100% of homes or for a list of homes receiving an EPS.

**OPTION 2:** Builders obtain their own waivers with the City.
1. Contact Energy Trust to request proof of EPS participation.
2. Complete online City of Portland Waiver Application at [www.pdxhes.com](http://www.pdxhes.com) at least ten days before listing, and attach EPS confirmation letter.
FAQs

• Shelf life?
  – 8 years for onsite assessment.
  – 2 years for energy rates and carbon factors.

• How long will it take to complete a Home Energy Assessment?
  – 45 minutes – 1 hour in the home.
  – 1-1½ hours including data entry.

• What’s the cost?
  – Market-driven, expected range $150-250.
Quality Assurance

✓ In field QA
✓ Desk review QA
✓ Data validation implemented in March 2018

Top Data Validation Fails:
1. The roof area is too small compared to foundation areas
2. Water heater efficiency out of range
Green Building Registry™

Search for City of Portland Home Energy Reports

Enter A City of Portland Street Address & Zip Code

Street Address

Portland  OR  Zip Code

Make sure you include the whole street address (SW, NW, CT, ST, etc.)

SEARCH
Green Building Registry™ Data Flow in Portland

- Home Assessment
- HEScore Tool or 3rd Party Software
- HES Database
  - Local Scorecard Generator
  - Database (SEED)
  - Conduit to RMLS
- RMLS
Green Building Registry User Experience

Latest data record for this home

5808 SW KRUSE RIDGE DR PORTLAND, OR | PROPERTY ID: R199895

Latest Home Assessment: 2018-03-06

This home’s energy score

Green Building Verification
Type: Home Energy Score
Green Verification Body: US DOE
Green Verification Year: 2018
Green Verification Version: v2017.0d3573cc
Green Verification Metric: 8
Green Verification Status: OFFICIAL
Green Verification Source: City of Portland, OR

Click the image to download the home energy report or copy the link above

CLOSE RECORD
Portland Auto-Populating RMLS
Q1 Program Stats
(as of 4/8/18)

• # of authorized Home Energy Assessors: 124
• # homes scored: 2708
• Unique homes scored in past week: 231
• Sample Compliance: 56%
• Compliance after enforcement: 80%
Q1 Program Stats
(as of 4/8/18)

- Average Base Score: 4.4
- Average Upgrade Score: 7.1
- Average HES change: 3 points
- Average $ savings: $306
- Average kWh savings: 1609
- Average therm savings: 113
What support is available to homeowners to improve their Home Energy Score?
Home Upgrades + Cash Incentives

Making energy-efficient upgrades to your home is a great way to improve comfort and save money and energy. Energy Trust provides cash incentives to help make your energy-saving upgrades more affordable. Many upgrades are also eligible for state and federal tax credits.

Choose a home energy solution below, or download our full list of incentives for Oregon homeowners.
Homestyle Energy Mortgage Loans

- Allows you to finance up to 15% of “as completed” home value for energy improvements.
- Home energy score is required.

**Example:**
1. Home has been appraised for $300,000 by lender.
2. Energy efficiency improvements and/or solar install expected to add another $20,000 in home value.
3. Buyer can finance up to an additional $48,000 to do improvements ($320,000 x 15%) and wrap into mortgage.
FHA Loans

- FHA borrowers can borrow more when they buy an energy efficient home. Lenders can provide a 2% stretch on debt-to-income ratios on purchase or refinance loans.
- Homes that Score 6 or higher on the home energy score.
- Or borrow can demonstrate that they are taking action to improve the home score to 6 or higher.
WHAT'S THE SCORE?

BEGINNING ON JANUARY 1, 2016, sellers of single-family homes in Portland, Oregon are required to obtain and disclose a Home Energy Report estimating the energy-related use, associated costs, and cost-effective solutions to improve the home's efficiency.
Next Steps

• Administrative rule changes later this year
• Initial stage of scoping program to drive upgrades
• Consistency across listing services
• Enforcement Automation
• Increase outreach, focused on Realtors and LEP communities
• Develop remote test out procedures.
Thank you!
Any questions?

Program Website:
www.pdxhes.com

Email:
HESinfo@portlandoregon.gov

503.823.5771