







# BetterBuilt<sup>NW</sup>



## Performance Path Utility Program Overview and Launch Guide

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## INTRODUCTION

The BetterBuiltNW team engages with public- and investor-owned utilities throughout the region to establish and support residential new construction programs based on Performance Path. This guide provides utilities with an overview and necessary steps to design and launch a successful program.

The Performance Path provides an opportunity for Northwest utilities to claim savings and offer an incentive for new construction single-family residential homes. BetterBuiltNW, Energy Trust of Oregon, Regional Technical Forum (RTF), and Bonneville Power Administration (BPA) collaborated to define whole-home energy modeling requirements and utility program design guidelines to ensure reliable energy savings for above-code homes across the Northwest.

Performance Path leverages REM/Rate™, as well as the trained network of Raters/Verifiers. Homes are submitted and validated through a program database (AXIS) for each utility-defined program, providing utilities with great flexibility and allowing them to tailor their new construction program offerings to the needs of their specific markets. As a result, utilities can partner with Raters/Verifiers, builders, and Home Certification Programs active in their territories to market and deploy their Performance Path program.







## GETTING STARTED

Prior to launching a Performance Path new homes incentive program, it's a good idea to consult with the BetterBuiltNW team. They can help you with program design orientation, Performance Path orientation, AXIS database configuration, quality assurance (QA) planning, and more.

### Program Checklist

The following checklist provides a step-by-step guide for ensuring that your program development is on the right track.

- 1 Orientation.** Begin by reviewing the [overview webinar](#), [accompanying slide decks \(Part 1 and Part 2\)](#) available on BetterBuiltNW.com.
- 2 Engage with market partners.** Reach out to builders, raters, and other organizations.
- 3 Design the program.** Determine utility-specific program elements, review Modeling Requirements, review the QA Overview, and submit the Program Design Form.
- 4 Complete AXIS database configuration and training.** The BetterBuiltNW team will coordinate your program configuration with the AXIS developers. Check out the [AXIS Abridged Overview and Updates](#). BetterBuiltNW can also schedule a personal, real-time AXIS review session with your team.
- 5 Complete internal program setup.** Internal program setup includes: application forms, W9s, website content, incentive processing, reporting, defining workflow between AXIS and internal systems, partner agreements, and partner network engagement.
- 6 Launch the program.** Consider communications for announcing program launch, as well as kickoff and orientation events for local partners. Raters/Verifiers may begin entering homes in AXIS whenever the utility gives the alert that they are ready. *If you host a kickoff event, BetterBuiltNW has ready-to-deliver orientation and training content. This also provides an opportunity to speak on the specifics of your program.*
- 7** Upon completing the above steps, file and field QA activities will begin and BetterBuiltNW will continue to provide support where needed.





## PROGRAM PLANNING AND DESIGN

During the program planning and design phase, you'll need to complete several important steps. Use this helpful [Performance Path Utility Program Design Form](#) to define your program elements.

Begin by engaging with relevant stakeholders to assess the needs of the local market. Stakeholders may include builders, Raters/Verifiers, Home Certification Programs managers, homebuilder associations, municipal authorities, and neighboring utilities. Email [BetterBuiltNW](#) if you need assistance with program design decisions, analysis of savings potential, and feasibility of proposed requirements and incentive structure or contact lists of local stakeholders.

### Mandatory Elements

The following elements are mandatory and must be included in your program:

- REM/Rate Modeling Requirements and associated files**
  - [Northwest Modeling Requirements v18.1 \(REM/Rate v15.7.1\)](#)
  - [BetterBuiltNW Equipment Modeling Flow Chart](#)
  - [User Defined Reference Homes for REM/Rate 15.7.1](#)
- Use of Rater/Verifier**
  - [Training Requirements](#)
- Use of AXIS database**
  - [Abridged Overview and Updates for Utilities](#)
- 10 percent improvement over code minimum threshold**
- Single-family new construction (can include attached single-family dwellings)**
- Specific space heating fuel source and/or equipment type for program eligibility**
- Program start date and earliest permit date for homes eligible under your program**

### Optional Elements

The elements listed below are flexible and optional. Consider including any (or all) of the following:

- Local or national home certification, such as ENERGY STAR®, Built Green, National Green Building Standard, or Earth Advantage (these are examples; many certification programs exist)**
- Higher percent improvement threshold to qualify beyond the 10 percent minimum**
- Water heating fuel/equipment type**
- Other equipment, appliances, or construction requirements**

### Examples

For your reference, here are several examples from other utility program designs:

- 10 percent improvement minimum, electric space heating, pass-through of BPA-utility reimbursement as the builder incentive (variable incentive based on kWh savings)
- 15 percent improvement minimum, electric space heating, pass through of BPA-utility reimbursement as the builder incentive, bonus incentive at or above 30 percent improvement
- 10 percent improvement minimum, electric cooling equipment, flat builder incentive
- 20 percent improvement minimum, gas space heating, flat builder incentive
- 20 percent improvement minimum, home certification requirement, electric space heating, flat builder incentive



### Review modeling and training requirements

All Raters/Verifiers who participate in Performance Path have appropriate training and experience with energy modeling and field inspections. Raters/Verifiers must also follow energy modeling requirements and use the appropriate reference home that represents code-level homes. These supplemental requirements are available on BetterBuiltNW.com.

- [Performance Path Rater/Verifier Training Requirements](#)
- [Northwest Modeling Requirements v18.1 \(REM/Rate v15.7.1\)](#)
- [BBNW Equipment Modeling Flow Chart](#)
- [Performance Path v15.7.1 User-Defined Reference Homes \(UDRH\)](#)

### Quality Assurance

Currently, the BetterBuiltNW team manages all File and Field QA services according to QA protocols that were developed and demonstrated during NEEA's Next Step Homes pilot project. QA will focus on developing the technical acumen of all participating Raters/Verifiers

and field staff. Refer to the [Performance Path Quality Assurance Overview](#) for specific details, or contact [BetterBuiltNW](#) for more information.

### Internal Mechanisms

You'll need to set up internal mechanisms such as application forms, W9s, website content, incentive processing, reporting, and partner agreements.

### Program Design

Once you've completed the Program Planning and Design steps, you're ready to submit the [Program Design](#) form for AXIS configuration.

### Kickoff Event and Program Announcement

Kickoff events and program announcements are a great way to spread information about your new program throughout the community. If you're interested in a program kickoff event or want support getting the word out, use this [Performance Path Event Planning Questionnaire](#) to guide your planning efforts, then submit to BetterBuiltNW.





## PROGRAM LAUNCH

Use the following checklist to ensure that your program launch is on track.



**1** Verify that AXIS configuration and internal set up are completed. Verify any program announcements and kick off activities are scheduled.



**2** Coordinate with BetterBuiltNW to post an update about your new program on [BetterBuiltNW.com](https://www.betterbuiltnw.com) and to share in newsletters.



**3** Announce and launch your program.



## PROGRAM MANAGEMENT

The tips detailed in this section are designed to help you with program management.

### AXIS

If you need additional AXIS training or experience difficulty within AXIS, reach out to the [AXIS Support](#) team or submit a ticket using the Help button found on every AXIS page. If you need to update your program configuration details, such as adjusting the percent improvement threshold or adding a home certification requirement, contact [BetterBuiltNW](#) to review and coordinate adjustments.

### Quality Assurance

The QA team will contact Raters/Verifiers, builders, and utilities to schedule Field QA visits. The team will conduct all File and Field QA activities, and will record the results in AXIS. If a utility is interested in additional involvement with QA activities or requires additional QA beyond what is offered, contact [BetterBuiltNW](#).

### Reporting

Numerous reports are available in AXIS. For custom report requests, contact [BetterBuiltNW](#).

### Incentive Processing

When processing incentives, it's important to ensure that all necessary forms have been collected from participating builders. Use AXIS to note when an incentive is approved and issued.

### Ongoing Partner Communications

Building relationships is key to maintaining long-term participation and achieving program success. Remember to stay in touch with the builders and Raters/Verifiers who participate in your program. Check in regularly and announce any program changes or updates. You can also contact [BetterBuiltNW](#) to receive support with partner roundtables, training, and other activities.

### Ongoing Support

[BetterBuiltNW](#) is available to answer any questions and provide ongoing support for program participants.





## NEXT STEPS



**1** Complete the orientation.



**2** Reach out to [BetterBuiltNW](#) if you have any questions or need assistance.



**3** Submit the [Performance Path Utility Program Design Form](#) when you are ready.