

Montpelier Working Group Meeting Notes

October 24, 2019 (v.3)

- Attendees
 - Richard Faesy
 - Barb Conrey
 - Anne Watson
 - Donna Barlow Casey
 - Maddie Koewler (phone)
 - Amy Gamble
 - Diana Chace
 - Samantha Caputo
- Report and highlights of the 10/23/19 Vermont Realtors Green Real Estate Symposium (Killington)
 - ~140 Realtors in attendance
 - Some questions asked about doing more around sustainability in real estate
 - NAR, Freddie Mac, NEREN in attendance
 - Discussions around mandatory vs. voluntary policies
 - Realtors responding well to the idea of the Energy Estimator and getting the data auto-popped from HELIX
 - “Whether you are doing this for a moral obligation or financial incentive, we are doing it for the client ...”
- Report on discussions with NEREN MLS related to Montpelier’s Ordinance
 - Vermont Home Energy Profile (VHEP) exists as a current certification in NEREN
 - Need to determine if the green verification metric field can accept numbers, letters and punctuation to fill \$/year field.
 - Richard will follow up with NEREN and report back at the next meeting.
- Review timeline and expectations for implementation
 - **Action Item:** Need to unpack the broader timeline to be more specific and include anticipated schedule for meetings with city staff and the City Council. This will ensure the tool development timeline is on track to meet Montpelier’s timeline.
- Review Draft Ordinance
 - Length of ordinance okay?
 - Identify the audience
 - No need to state the goal in the ordinance language but could have a purpose statement in the ordinance. The goal is to provide:
 - Consumer protection
 - Low cost way for the city to encourage people to decide to make energy improvements
 - City needs data about home energy information
 - HELIX and VHEP shouldn’t be in the ordinance language, they should be in the implementation document, move technical statements about the VHEP to implementation guide. Also consider the language in the implementation guide, who is the audience for this (city staff), so does the description need to be super technical?
 - Implementation document should be written like a recipe / instruction manual
 - Implementation document for the city
 - Implementation document for the homeowner that will have to comply

- Add a clause to the ordinance that acknowledges the state residential label in development and if/when one is developed, the city will adopt that label
- How do we define residential homes for the ordinance? Does the tool account for number of kitchens?
- Person who has authority might be different from the staff overseeing compliance
 - Use “staff responsible” instead of “director” currently identified in ordinance (this was a direct pull from Portland, OR)
- Clarify that “City utility franchise fee” is a lesson learned from Minneapolis (this is not in the actual ordinance language)
- **Where the information has to be listed:** online listings (MLS and other online platforms) and then available when buyers viewing the house (e.g. open house) – provide to any potential buyer
- Energy Estimator
 - More than one heating source in the model? The Energy Estimator models off the primary, disclose that there is a secondary heating system – how to address this? **Ask Veronique about this.** A lot of homes have more than one heating source
 - The front-end needs more description and instruction for the user
 - Create a customer guidance document with info on which homes are covered
 - Ask Veronique if you can see the Profile generated for a home you don’t claim when searching the front-end
 - Can we include number of kitchens in the model?
 - **Richard to follow up with Veronique.**
 - The Energy Estimator should really be thought about as a platform that can be used to present any information about a home, including a Home Energy Score that may have been generated. The Energy Estimator pulls data from HELIX to generate the VHEP, if the working group prefers to use HES, the Energy Estimator can be used to present the HES in the VHEP.
 - Privacy concerns:
 - Feels vague
 - The Energy Estimator pulls data from publically available sources and the homeowner has the option to supplement with utility bills and information about assets in the home (e.g. ENERGY STAR appliances), but only the Profile goes into HELIX with the main metric (\$/yr.) to populate the MLS
 - If you have a Profile generated, when can someone see it? Is it public on the ClearlyEnergy frontend?
 - When a Profile is generated, can there be a step that asks the owner about sharing it on the frontend?
 - Claiming a home; what security is there?
 - Should there be an acknowledgement document at the bottom of the tool that states the city has access to the Profile in HELIX?
 - The next buyer would generate a new Profile when selling the home
- Review Draft Implementation Guide
 - There remains a question about compliance... how will this be covered?
- Next Steps
 - Develop more granular timeline
 - Update the City Council on the development process: share background and updated timeline. Identify when public comment period will be
 - Share timeline with MEAC

- Not going to provide a grace period, so need to decide either policy effective Fall 2020 or January 2021
- Get Montpelier representative in the PSD residential labeling working group
- Funding:
 - Budget for Richard- MEAC has limited funds that may be available (~\$5k)
 - NEEP available for technical assistance (limited scope)
- Next Meeting
 - Vote on whether the VHEP will be the label and then include that for the next meeting with city council.
 - Plan for presentation to MEAC and then the City Council
 - November 8th from 10-11:30 at the Montpelier High School
 - Subsequently changed to Nov. 11 from 10-11:30 at MHS

Original Timeframe:

Process	Timeframe
Develop and coordinate a series of public and smaller group discussions involving representatives from all stakeholders	Summer – Fall 2019
Vet the potential ordinance options and listen to stakeholder input, ideas and reaction	Fall 2019 – Winter 2020
Draft ordinance language based on stakeholder feedback and discuss in open City Council meetings before voting on the final ordinance language	Winter 2020
Policy passed	Spring 2020
Disclosure mechanics development, testing, training	Winter – Spring 2020
Policy effective	Summer-Fall 2020
Compliance required	January 2021