

RESNET[®]
RESIDENTIAL ENERGY SERVICES NETWORK

2019
Conference
New Orleans, LA • Feb 25-27



RESNET QA - Where Are We Today?

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Agenda

- What Going on Now
- 2018 Year in Review
- 2019 Exciting Times Ahead
- Q&A

Reflections on the Past

Who was here 10 years ago when the conference was last in New Orleans?



Added Billy Giblin to our Team!





WHAT
YOU
NEED
TO
KNOW

Addendum 30

- Addendum 30 is back out for public comment!
- Only a few minor changes have been made
- Draft proposed amendment will be out for official public comment for 30 days
- Deadline for Comment is March 22, 2019
- Everyone is encouraged to review this amendment and suggest changes!

Addendum 30- Comment Tips

- Don't submit comments that relate to any other sections of the RESNET Standards; they will be rejected/ignored
- Don't be vague or provide general feedback. While it can be taken under consideration, it's not 'actionable'.



image4123.com

Addendum 30- Comment Tips

- Only submit comments on text that appears as ~~strikethrough~~ or underline.
- Don't have each Rater in your organization submit the same comment! One 'group' comment is enough!

Reminder: volunteers on the committees respond to these comments (not paid RESNET staff)



Addendum 30- What's Next?

- After the public review process the SDC 900 task group will reconvene (hopefully for the last time!)
- Comments will be review and responded to
- Determine if another public comment period is needed



Addendum 30- Implementation

■ Determine the effective date and transition period

- ▶ *Transition Period*- The period of time beginning on the Effective Date, during which an amendment shall be allowed, but not required, to be used for any Dwelling Unit or Sleeping Unit.
- ▶ *Transition Period End Date*- The date that concludes the Transition Period. An amendment shall be required to be used for a Dwelling Unit or Sleeping Unit whose Building Permit Date is after this date.

Big Changes from Addendum 30

- QADs will be able to use remote QA
 - ▶ Still need to complete one “live” QA annually



Big Changes from Addendum 30

- Pre-drywall QA able to count as a QA review
 - ▶ May replace 10%, but no more than 25% of required reviews



Big Changes from Addendum 30

- Providers being allowed to use QA Delegates is going
 - ▶ Everyone conducting QA reviews need to be a certified Quality Assurance Designee



Big Changes from Addendum 30

Changes to QAD Professional Development

- ▶ 905.2.3.1 All Quality Assurance Designees annually shall:
 - ▶ 905.2.3.1.1 Document attendance at the RESNET Conference or of RESNET approved CEUs; and
 - ▶ 905.2.3.1.2 Participate in a one-day in-person (or virtual) RESNET update and training.



Big Changes from Addendum 30

- Field and File QA Checklist will be a requirement for QA Reviews



Big Changes from Addendum 30

- Remember that addendum 29 removed the requirement that QADs be financially separated from the provider and required new QADs to be trained by RESNET





2018
the year in
review

2017 Annual Report Reviews

- 32 providers placed on probation
 - ▷ Not conducting quarterly QA reviews
 - ▷ Not completing amount of QA required per rater
- 42 Providers with findings
- 10 Providers with minor findings
- 2 Providers with no findings



2017 Annual Report Reviews

Common findings

- Status for rater/RFI not updated in the Registry
- Calibration and Professional Development records are not up to date
- Addresses reported being used for field QA reviews are not in the Registry

Rater Management



2017 Annual Report Reviews

Common findings

- Findings for file and field QA reviews not submitted or no findings were reported
- Disclosure forms for all active raters are not submitted (going away for the 2018 report!)
- Reporting is incomplete (check your work!)



2018 Reports Due March 31st

Tips!

- Gather all of the required documentation before completing the checklist
- Answer any required questions (version of rating software)
- Check the raters and RFIs listed in your providership on the RESNET Registry including certification and recertification dates



2018 Reports Due March 31st

Tips!

- Check the number of ratings registered in 2018 per rater in the RESNET Registry to make sure it matches your submission if you do not use the QA spreadsheet export from the RESNET Registry.

If you are not reporting QA through the Registry, best practice is to use the QA spreadsheet export from the Registry as the basis for your QA report.

Rating Management

Manage Ratings	
<input checked="" type="checkbox"/>	Add QA Review
<input type="checkbox"/>	Print Appraisal Institute Addendum
<input checked="" type="checkbox"/>	Rescind Approval of Rating
<input type="checkbox"/>	Back to Manage Ratings

2018 Online QA Reviews

25 Providers Selected for Online Reviews

- YTD ratings and QA conducted in 2018
- File Review Process
- Field Review Process
- Sampling process (if applicable)
- Complaints received and responses provided
- Rater disciplinary action taken
- New RFI/Rater Candidate mentored rating documentation
- RESNET automated QA reporting tool results review



2019 Online QA Reviews

Coming in 2019!

- Will request the provider send a file review they completed including all documents they required the rater to send to them prior to the call
- QA Team will conduct a review of that same rating to see how the results compare to the QADs



On site Reviews

- Asked the board of directors in 2017 for additional money in the budget to hire an in-field specialist
- Standards allowed us to start on site reviews without changing the standards

“RESNET shall select a minimum of 25% of accredited QA Providers and conduct a more detailed review of their Quality Assurance records”



On site Reviews

26 Providers in 10 states!

RESNET QA Team learned SO much doing the onsite reviews



Share Your Experience with Your Peers



What Could be Coming in 2019?

Big Things On The Horizon



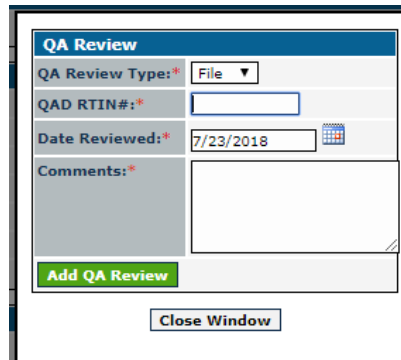
RESNET Staff Proposals

- QA Team has developed a list of proposed QA initiatives to the RESNET Board of Directors
- The Board of Directors are reviewing these proposals and once they are approved the QA Team will develop a work plan



Updates to the RESNET Registry

- Ability to track RFIs inspections for QA reporting
- Ability for provider to add RFI to providership and add certification date
- Review and improve rating flags



The screenshot shows a web form titled "QA Review". It contains the following fields and controls:

- QA Review Type:** A dropdown menu with "File" selected.
- QAD RTIN#:** An empty text input field.
- Date Reviewed:** A date picker showing "7/23/2018".
- Comments:** A large, empty text area for entering notes.
- Buttons:** A green "Add QA Review" button and a "Close Window" button.

Ongoing QAD Training

- Continue webinar series of QAD training in 2019
- These will be required but recorded so you can view them at a later time
- Topics will include observations from the online and onsite QA reviews
- Interested in hearing your ideas for training topics!



Utility Pilot Program

- Develop pilot program to explore having utility program QA field reviews count toward quality assurance reviews required by RESNET
- Individuals doing quality assurance for utility programs would be trained by RESNET Staff and will comply with RESNET Standards for conducting quality assurance
- Educate providers working in the pilot

Utility Pilot Program

Learn from the pilot program

- Is this possible?
- What findings do the utility program implementers discover that RESNET QA reviews do not discover and vice versa
- Reporting QA reviews to RESNET



Merit Based QA

Proposing to the Board of Directors that they consider having a merit based QA program for providers

- Should high performing providers who go the extra mile get something in return for that?



Merit Based QA

- Could RESNET effect change in the form of improved QA oversight through a voluntary incentive program?



Merit Based QA

- Should the incentive also be given to high performing raters that consistency do well on their QA reviews?



Merit Based QA

Considerations

- How to make sure the RESNET QA program is still the gold standard?
- How to make the incentive program fair for all providers?
- How to make implementation of the program upfront with clear and understandable criteria?



Merit Based QA

- Only a proposed Initiative to the RESNET Board of Directors
- Would have to go through the public review process since it is an amendment to the RESNET Standards
- You will get to weigh in on this if the board votes to move forward with this!



Automated QA Tool Reporting

- Create and deliver reports to providers from RESNET's automated QA tool
- The RESNET Board and Providers have requested that reports be provided
- RESNET QA Team is looking into the possibility of sending quarterly reports to providers and tracking their progress making changes flagged by the tool

Automated QA Tool Reporting

Next Steps after Board approval

- Develop automation so that the reports would not have to be pulled manually by the QA Team
- Educate providers and QADs on the meaning of the flags in the tool and what action they need to take if they are flagged by the tool



Sessions You Should Attend!

- RESNET QA Team's Observations from the Field (QAD Roundtable)
 - ▶ Tuesday, February 26, 2019 - 3:30 PM-5:00 PM, Oak Alley
- RESNET Online Quality Assurance Reviews and the Power of QA Genie
 - ▶ Wednesday, February 27, 2019 - 8:30 AM-10:00 AM, Oak Alley

Q&A

