

We will be starting soon!

Thanks for joining us



Elements of a Whole House Assessment: The Home Energy Audit Explained



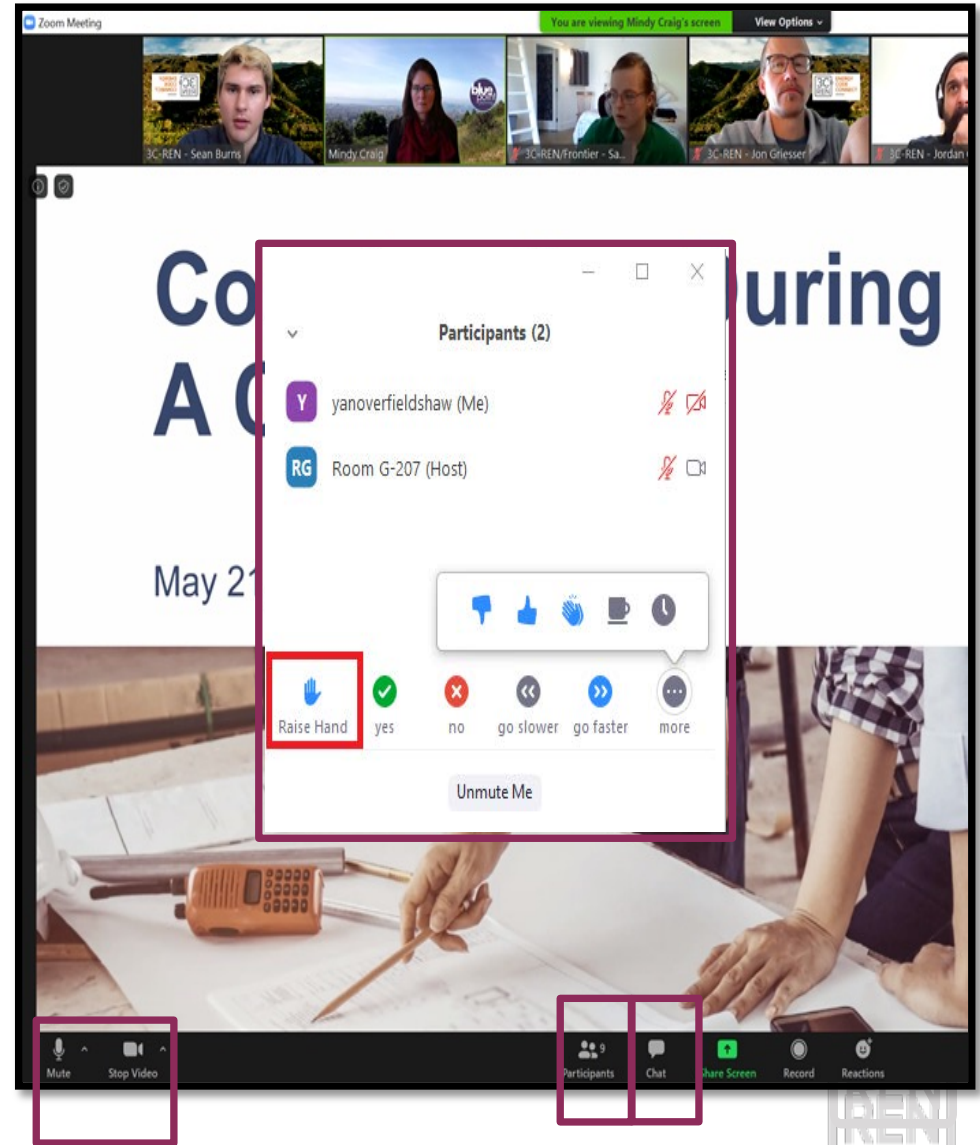
Judy Rachel – Home Performance Pro

February 13, 2024



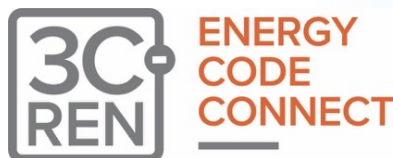
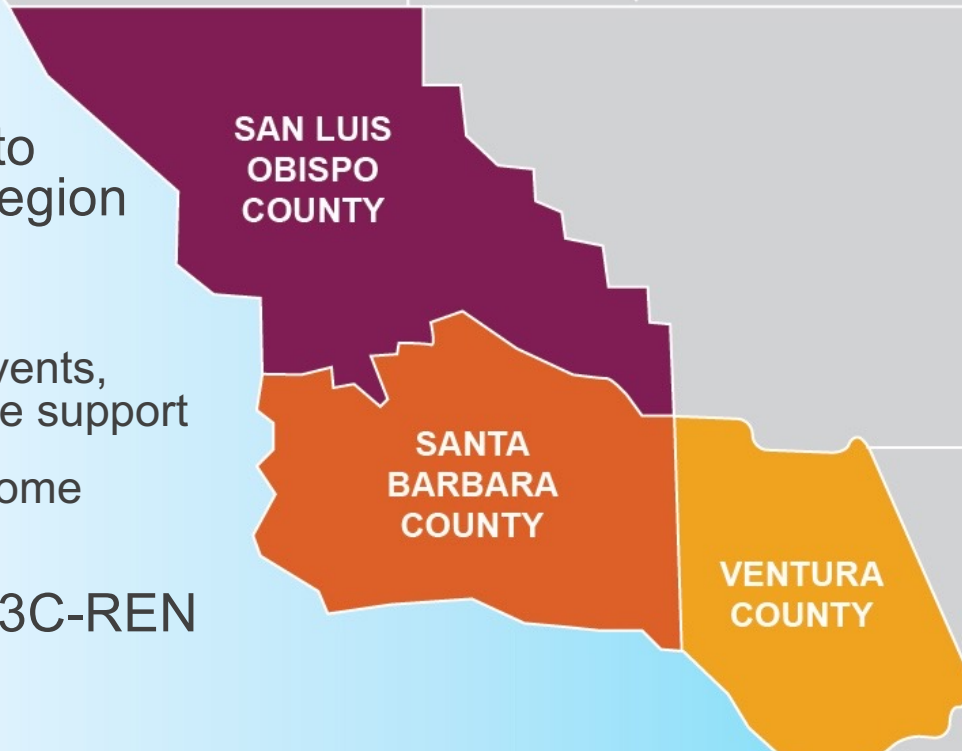
Zoom Orientation

- Please be sure your full name is displayed
- Please **mute** upon joining
- Use "**Chat**" box to share questions or comments
- Under "**Participant**" select "**Raise Hand**" to share a question or comment verbally
- The session may be **recorded** and posted to 3C-REN's on-demand page. Feel free to ask questions via the chat and keep video off if you want to remain anonymous in the recording.



3C-REN: Tri-County Regional Energy Network

- Three counties working together to improve energy efficiency in the region
- Services for –
 - **Building Professionals:** industry events, training, and energy code compliance support
 - **Households:** free and discounted home upgrades
- Funded by ratepayer dollars that 3C-REN returns to the region





ENERGY
CODE
CONNECT

- Serves all building professionals
- Three services –
 - **Energy Code Coach**
 - **Training and Support**
 - **Regional Forums**
- Makes the Energy Code easy to follow

Energy Code
Coach:
3c-ren.org/codes
805.781.1201

Event
Registration:
3c-ren.org/events





**BUILDING
PERFORMANCE
TRAINING**

- Serves current and prospective building professionals
- Expert instruction:
 - **Technical skills**
 - **Soft skills**
- Helps workers to thrive in an evolving industry

Event Registration:
3c-ren.org/events





Multifamily (5+ units)

- No cost technical assistance
- Rebates up to \$750/apartment plus additional rebates for specialty measures like heat pumps

Single Family (up to 4 units)

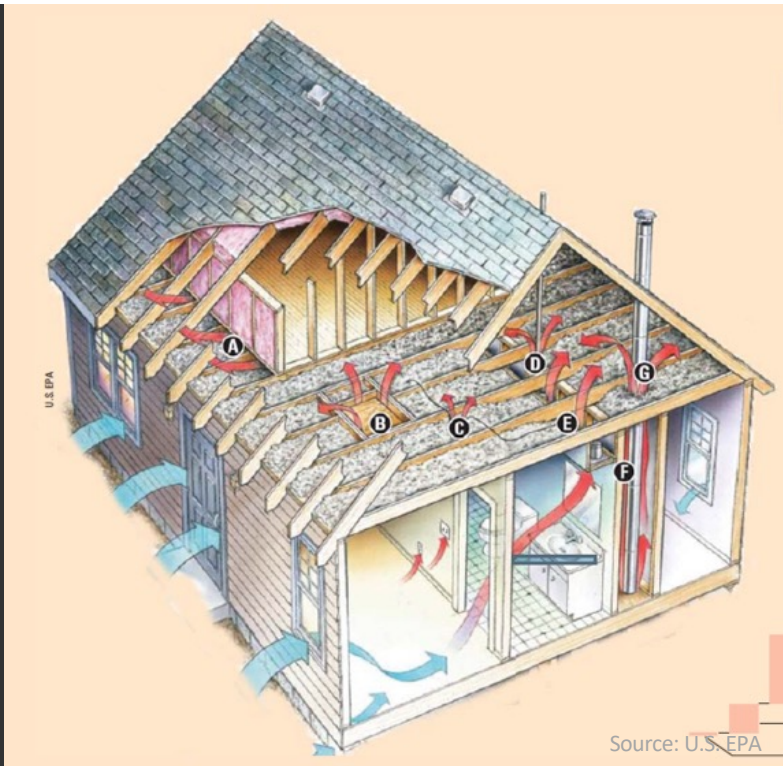
- Sign up to participate!
- Get paid for the metered energy savings of your customers

Enrollment:
3C-REN.org/contractor-participation



Elements of a Whole House Assessment

The Energy Audit Explained



The “Energy” in Home Energy Audit

2nd Law of Thermodynamics

Energy flows naturally from high to low concentrations

- Pressure flows from HIGH to LOW
- Heat flows from WARM to COLD
- Moisture flows from MORE to LESS
- Energy In = Energy Out
- 1 CFM Out = 1 CFM In

Purpose of a Home Energy Audit

- To assess the energy flows and how those flows are impacting building durability, indoor air quality, occupant safety, health and thermal comfort.
- To learn the homeowner's wants, needs, motivations and expectations for their home.
- To determine how the house is currently functioning through a combination of visual inspection and diagnostic testing.
- Provides the information necessary to offer substantive solutions through a comprehensive scope of work.
- Establishment of a trust relationship between the parties.



The “Whole House” Inspection

There are many tests and inspections to perform.

Do the tests that fit the situation.

1. Pre-Arrival Tasks
2. Occupant Interview
3. Visual Site Inspection
4. Ventilation, Moisture & IAQ
5. Enclosure Tightness & Blower Door Testing
6. Insulation Performance
7. Space Heating Equipment
8. Space Cooling Equipment
9. Air Flow and Ducts
10. Diagnostic Tests
11. Combustion Appliance Safety Testing
12. Appliances and Water Heating
13. Lighting

The Process

Test-In

- Often called an “Energy Audit”
- Scientific measurements of current home’s performance

Report

- Findings and recommendations
- Provides a road map for retrofitting the home

Plan

- Decide on the improvements which address the issues and fit the budget
- **Every project is a unique job – one size does not fit all**

Execute

- Do the work
- Quality is critical to success

Test-Out

- Test again to verify the results
- Provides feedback



The Energy Audit

“Test – Don’t Guess”

- Testing helps us to:
 - Direct our efforts
 - Direct our time
 - Direct your client’s money
- Provides a baseline against which to measure results

Pre-Visit Preparation



Utility Bills

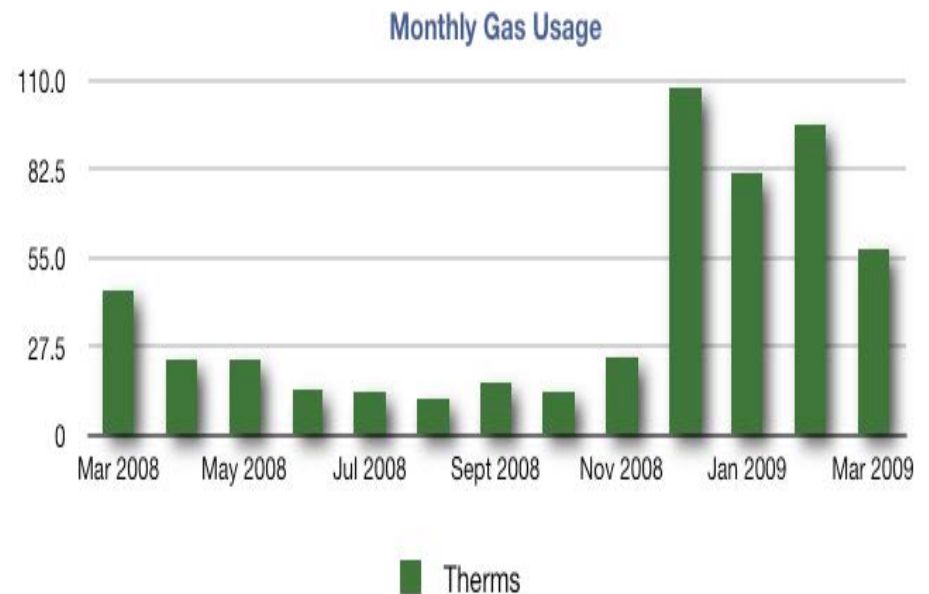
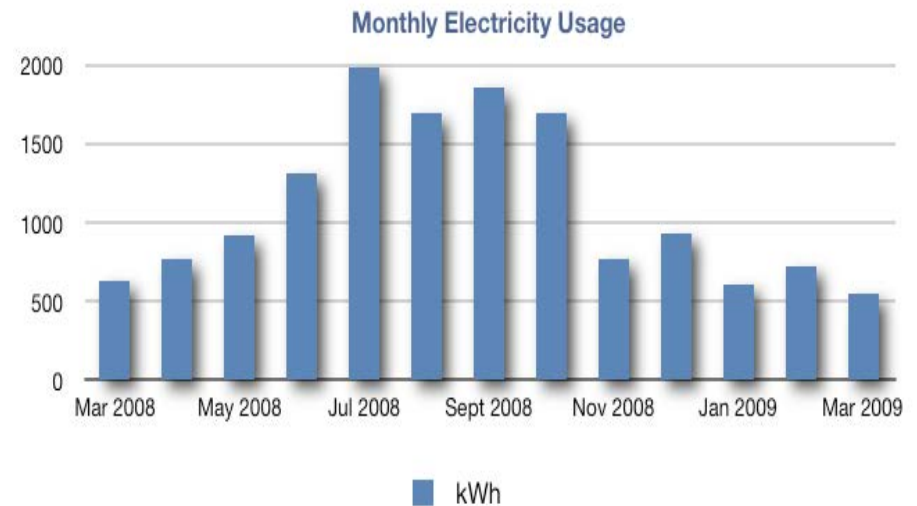
- Useful tool for gauging a building's energy efficiency
- Contain an array of useful information such as energy consumption and rate information
- A scorecard measuring energy savings from Home Performance upgrades

Purpose of a Utility Bill Disaggregation

To estimate baseload and calculate seasonal loads.

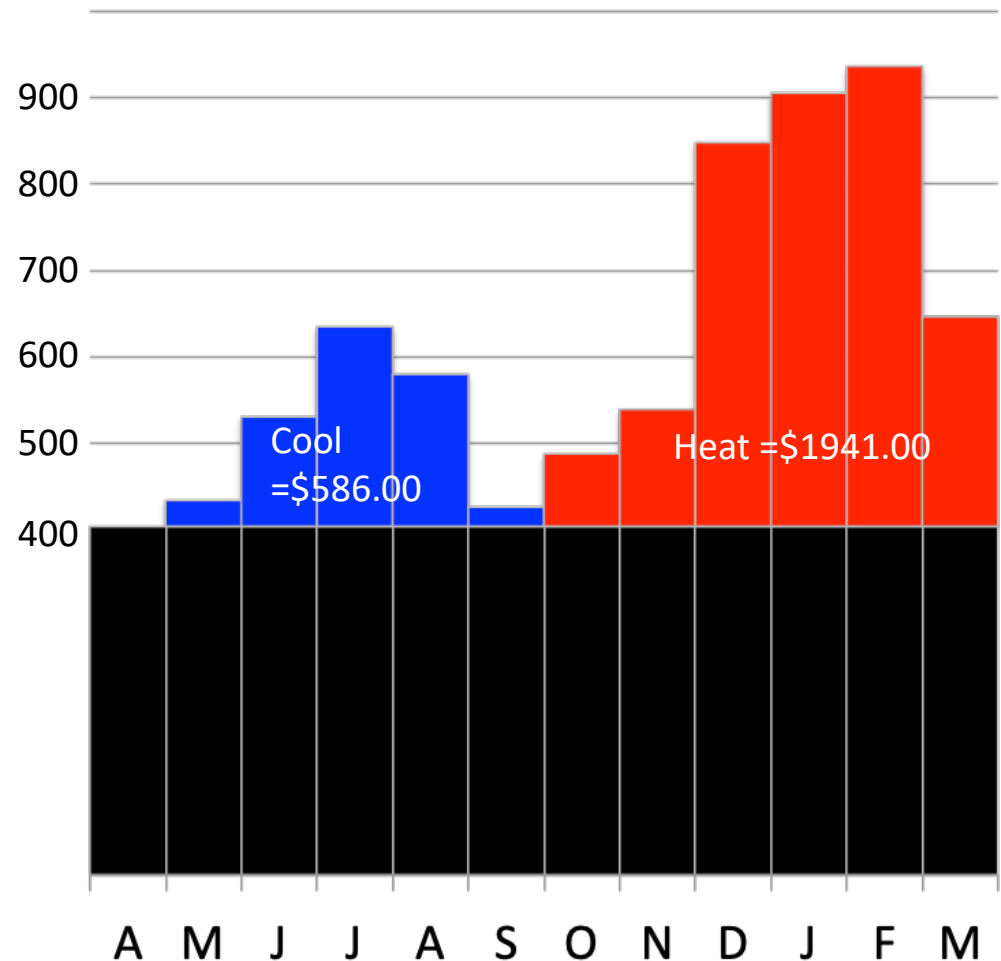
Seasonal Heating / Cooling Loads can comprise ~ 40 to 50% of a home's energy consumption.

Baseload – Lighting, Appliances, Hot Water, etc.



Utility Bill Disaggregation

Jan	03	\$905.55
Dec	02	\$848.28
Nov	02	\$539.35
Oct	02	\$487.77
Sept	02	\$426.22
Aug	02	\$579.94
July	02	\$634.93
June	02	\$530.67
May	02	\$433.85
April	02	\$403.88
March	02	\$646.66
Feb	02	\$936.72
Total		\$7374.00



Energy Consumption in Dollars

Base Load \$404.00 per month

Annual Base Load \$4,847.00

Annual Cooling Load \$586.00

Annual Heating Load \$1,941.00

Annual Total \$7,374.00

Conditioned Floor Area 6,000 sq.ft.

Total Heating & Cooling \$2,527.00

Space Conditioning Cost \$ 0.42/sq.ft.

(2004 dollars and utility rates)

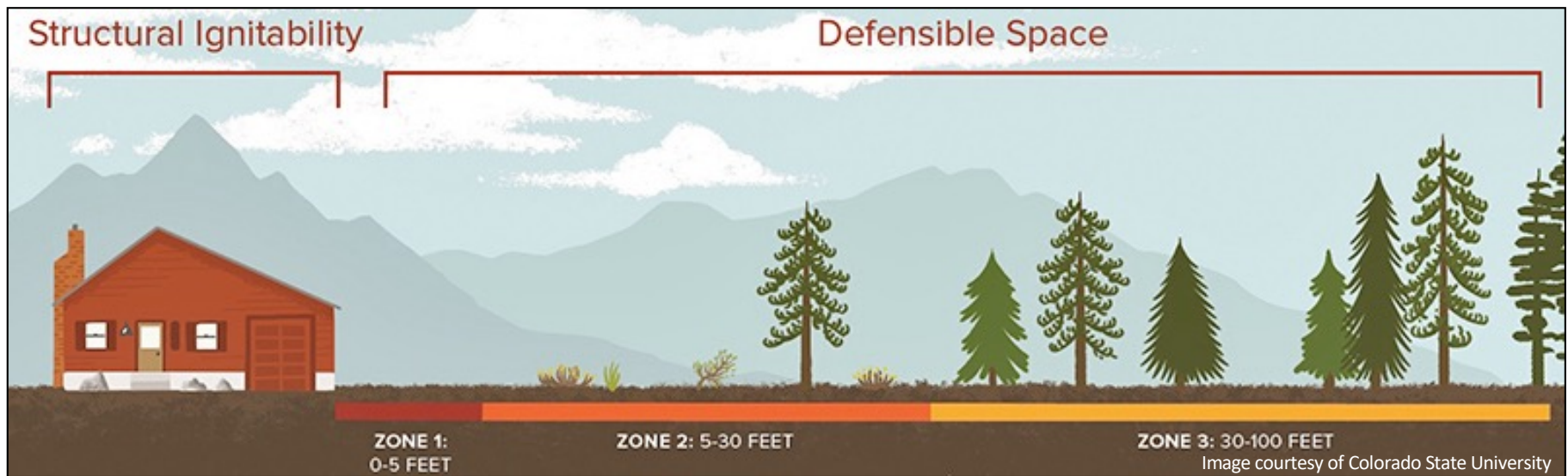
Comparing Dis-aggregation of Redding Showcase Homes

	\$100 K Geothermal Heat pump	\$15K Conventional Heating/Cooling
Conditioned Floor Area	6,000 sq.ft.	3,500 sq.ft.
Total Heating & Cooling	\$2,527.00	\$317.00
Space Conditioning Cost	\$ 0.42/sq.ft.	\$.09/sq.ft.

Un-retrofitted existing homes typically range from .25/sq.ft. to \$2.50/sq.ft. for heating and cooling.

Environmental and Regional Considerations

- Soil types and soil gases
- Industrial pollution of air, soil and water
- Wildland Urban Interface
- Elevation of the home
- Wind factors
- Annual temperatures
- Annual precipitation



The Evaluation of the House Begins as You Drive Up to the House

- Upgrades?
- Additions?
- Roof Condition?
- Rain Gutters?
- Site Drainage?
- Vent Terminations?
- Overall Neighborhood?



Occupant Interview

Ask About...

- The number of occupants and percentage of occupancy
- Ventilation: Are windows opened? Are bath fans used?
- Health concerns, allergies or IAQ complaints
- Thermostat wars
- Seasonal issues: crawl space flooding, mold, odors
- The more information you gather, the better . . .

Explain what you will be doing

- Explain the tests you will be performing
- Explain the time required for testing
- Encourage customer participation





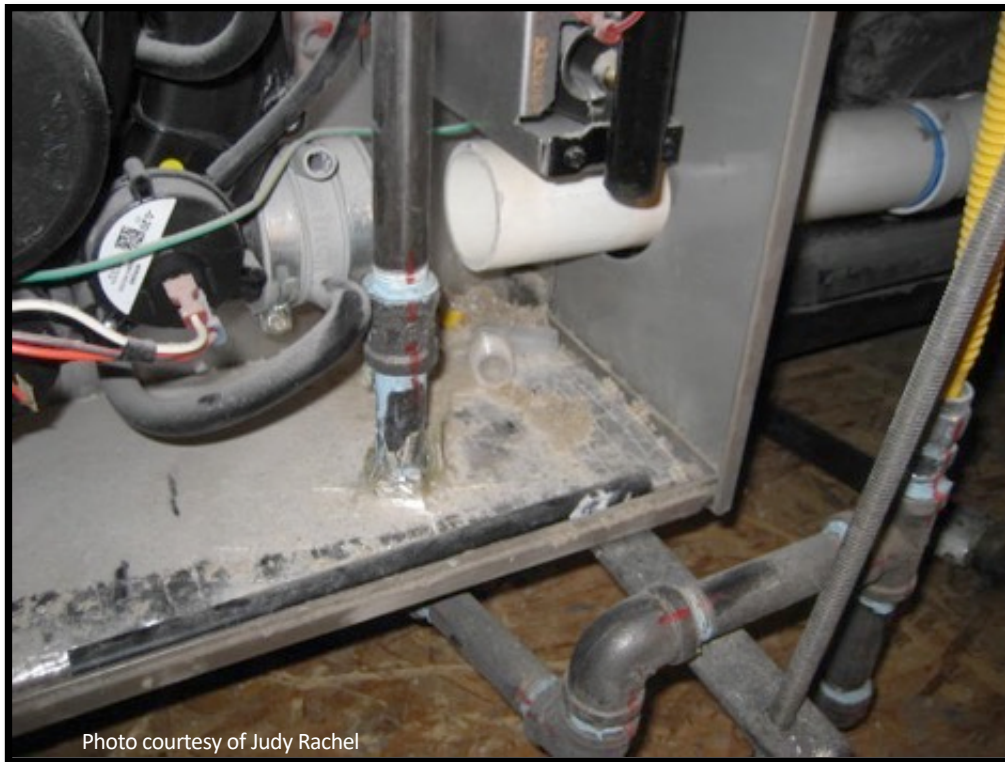
Photo courtesy of Judy Rachel

Exterior Inspection

Moisture
Landscaping
Solar orientation
Siding penetrations/cracks
Roof, flashings,
penetrations
Rain gutters & downspouts
Windows & doors
Deferred maintenance
Unusual conditions

The More Information You Have, the Better

Take Lots of Pictures



Trees and Plants

Foliage – Can help buffer a building from extremes, help control surface water, but can harm a home if too close.



How Water Enters a Building

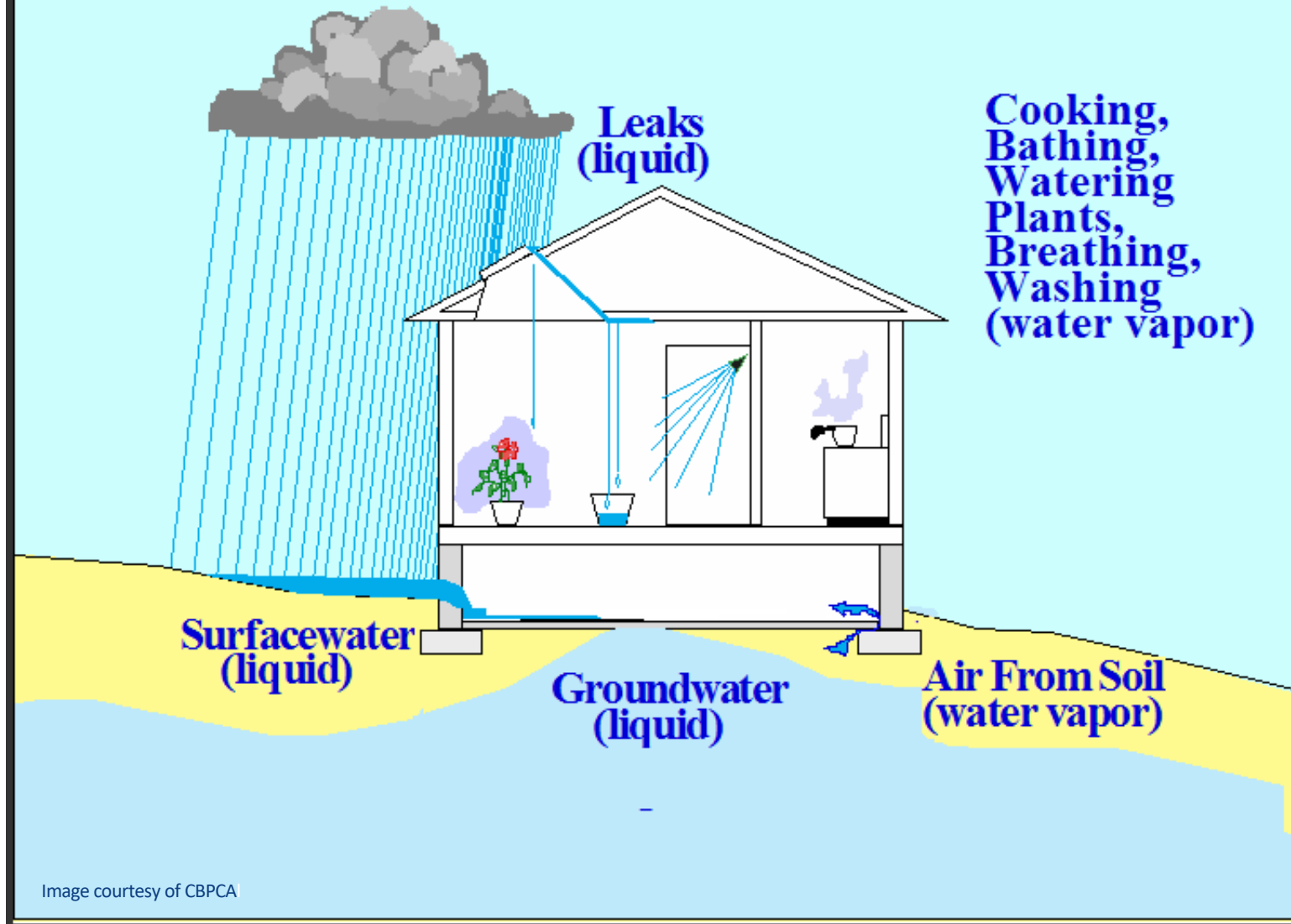


Image courtesy of CBPCA

Bulk Moisture – Water

Water in and around homes needs to be controlled

- 1. Identify the Source – Where is the moisture coming from?**
- 2. Determine the Pathway – How is it getting in?**
- 3. How is it being Transported?**



Photo courtesy of Judy Rachel

1 inch of rainfall
equals 1,250
gallons of roof
runoff for a 2,000
square foot
house

Moisture



Plants Need To Be Watered Not Houses



Photo courtesy of Judy Rachel

Photo courtesy of Judy Rachel

Direct water away from/out of the house



Roof

Furnace Vent



Power Line Unattached



Deferred Maintenance



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Interior Inspection



Photo courtesy of Judy Rachel

Moisture
Indoor Air Quality
Air Leakage Paths
Health & Safety
Pressure Imbalances
Supplies & Returns
Ventilation
Baseload Appliances

Moisture



Indoor Air Quality

Mold



Photo courtesy of Judy Rachel

IAQ / Air Leakage Path

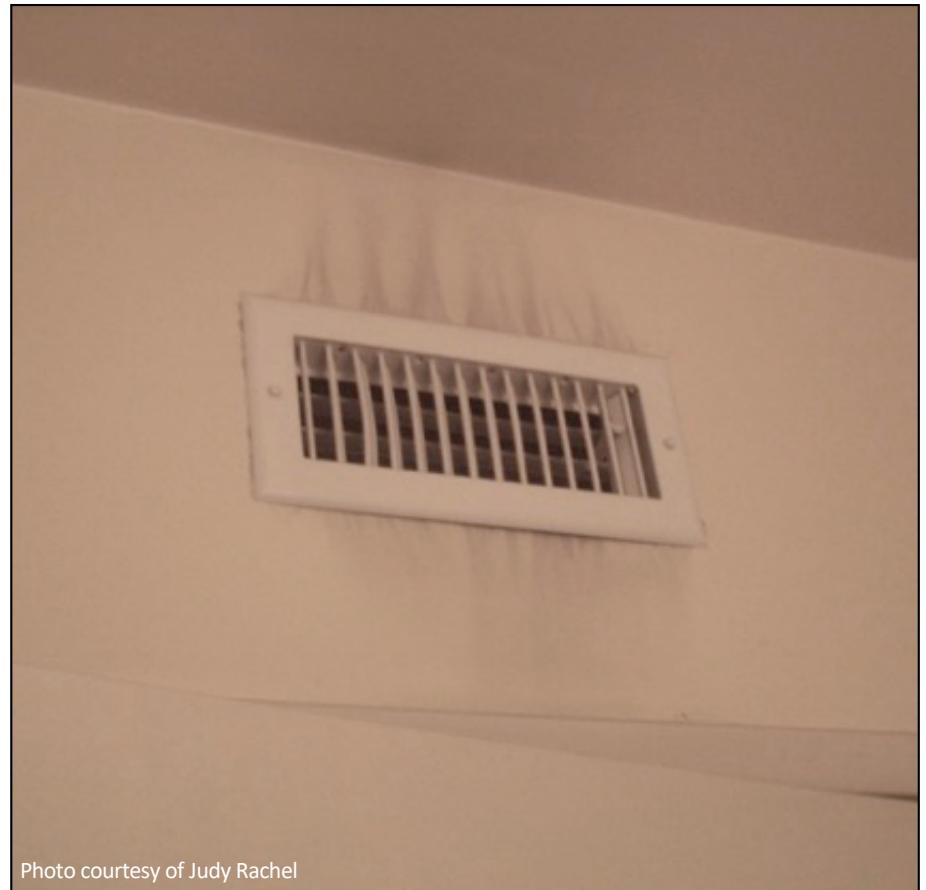


Photo courtesy of Judy Rachel

Indoor Air Quality



Unducted Returns



IAQ / Air Leakage / Poorly Installed Duct . . .



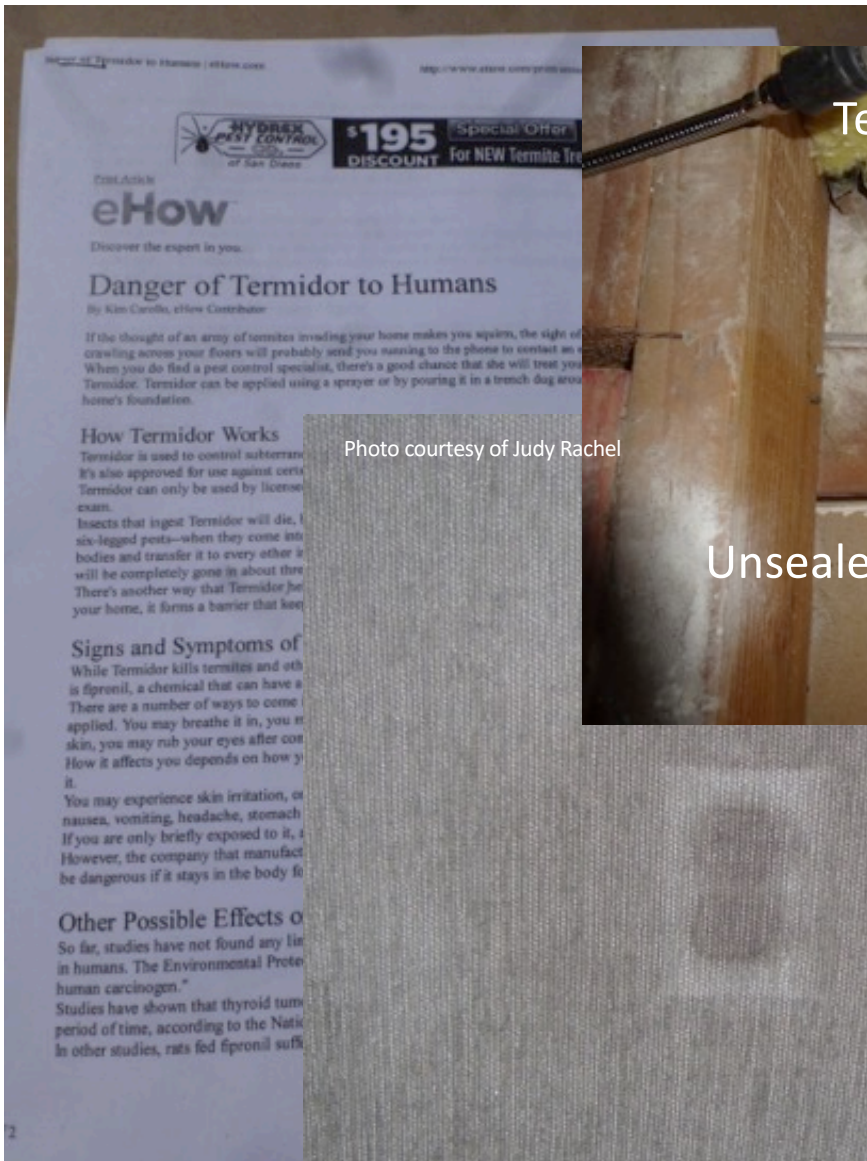


Photo courtesy of Judy Rachel



Termidor insecticide



Unsealed attic top plate



Photo courtesy of Judy Rachel

Indoor Air Quality

Indoor Air Quality / Safety

Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Clues to Pressure Imbalances



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Pressure Imbalances



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Air Leakage Path



Air Leakage Paths

Interior stairs on exterior wall



Behind baseboards



Ventilation

Passive Kitchen Ventilation blocked off but replaced with nothing



Passive closet ventilation into attic



Ventilation



Ventilation



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

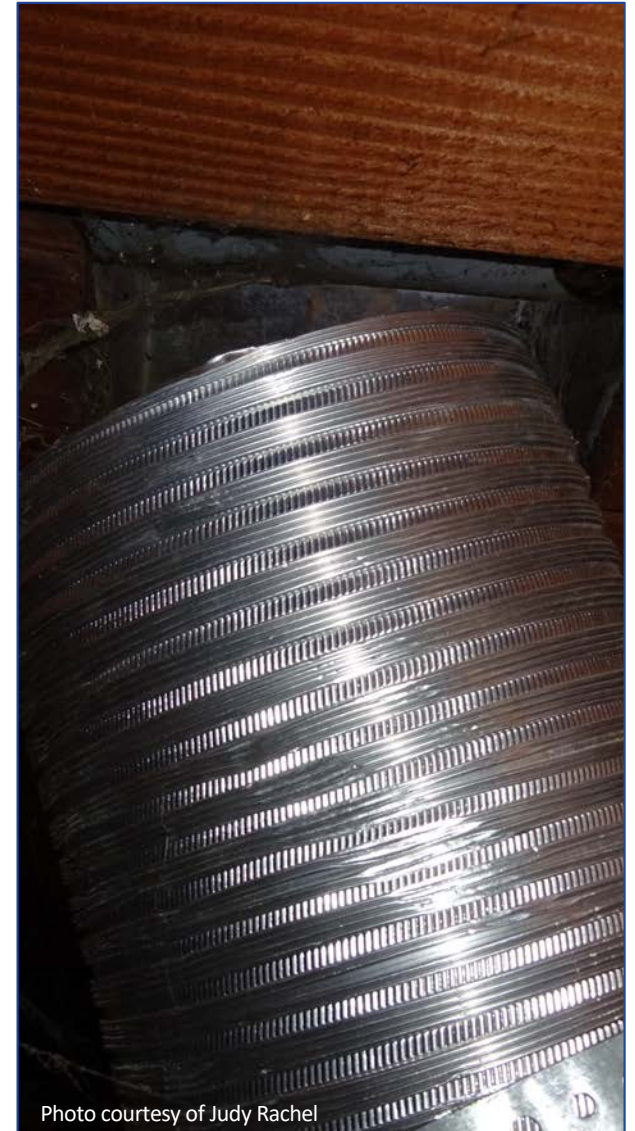


Photo courtesy of Judy Rachel

Insulation Contact Air Tight Recessed Can Lights

Are these or aren't these?



Remove the trim ring & look for
the orange label.



Safety





Photo courtesy of Judy Rachel

Crawl Space/Attic Inspection

Moisture
Insulation
Air Leakage Paths
Ducts
Health & Safety
Deferred Maintenance
Building Durability
Ventilation

A Crawl Space is Not a Dry Space





Roofing nail shows signs of moisture

Water Vapor

Powder dry soil still evaporates moisture



Ground Source Vapor Barrier



Air Sealing Opportunities Crawl Space



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

The Underside of Bathtubs



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Deferred Maintenance



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Indoor Air Quality



Photo courtesy of Judy Rachel

Indoor Air Quality



Crawl space



Attic

Air Sealing Opportunities

Attic



Photo courtesy of Judy Rachel

Air Sealing Opportunities Attic



Photo courtesy of Judy Rachel

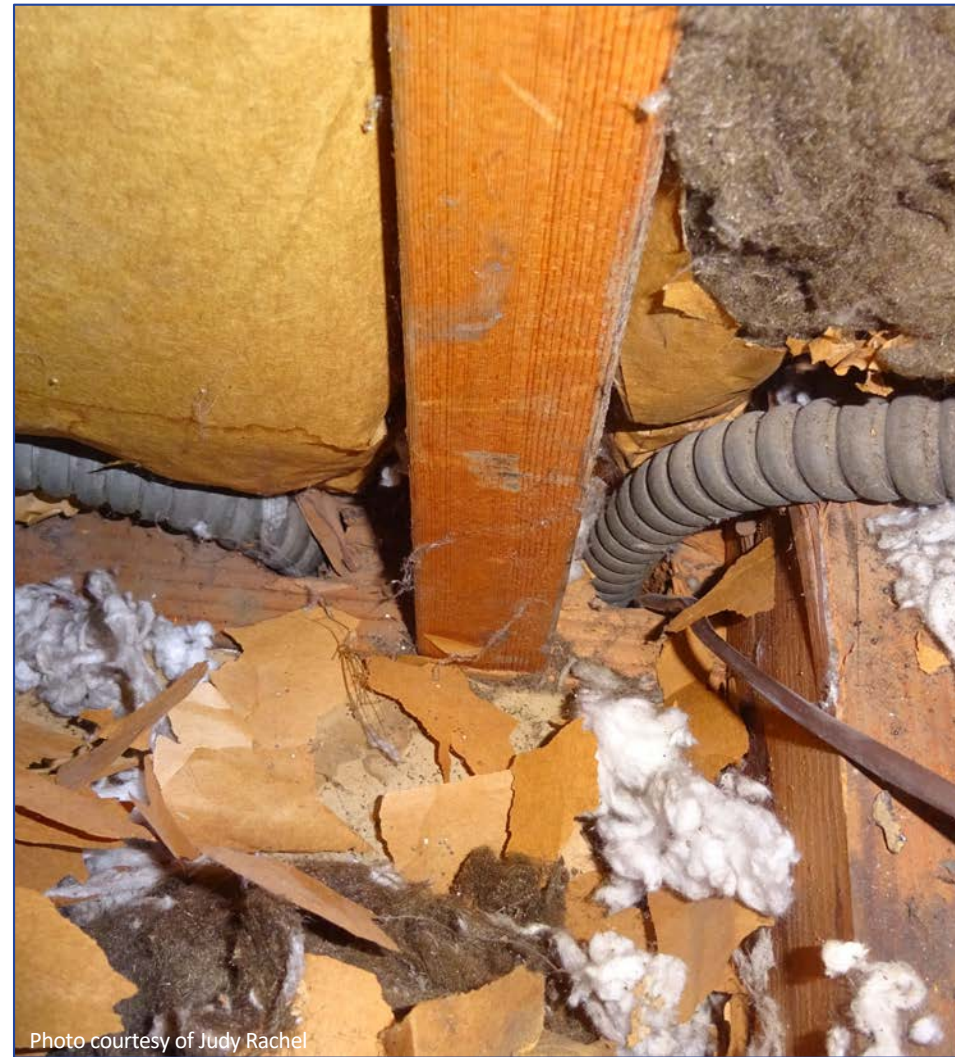


Photo courtesy of Judy Rachel

Air Sealing Opportunities

Attic

Interstitial Cavity



Attic Opportunities



Photo courtesy of Judy Rachel

Quantity / Quality of Insulation

- Attic?
- Walls?
- Floors?

Visual inspection, infrared aided with blower door, probing past switch plates in walls, asking occupants questions

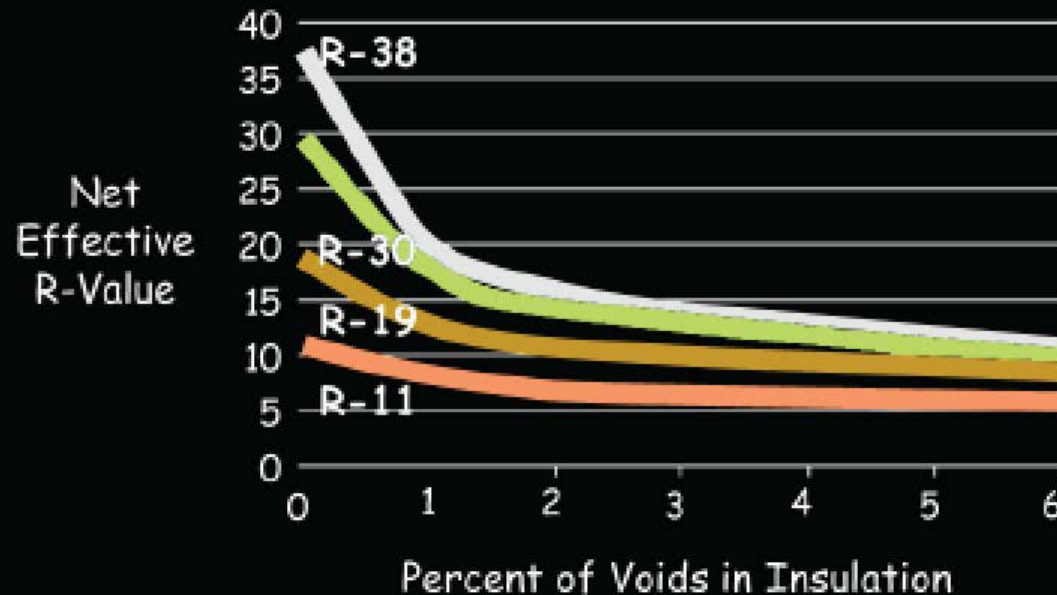


Missing & Poorly Installed Insulation



Photo courtesy of Judy Rachel

EFFECT OF GAPS AND SPACES ON BATT INSULATION EFFECTIVENESS



Source: Insulate and Weatherize by Bruce Harley, 2002

This chart shows how gaps or spaces in insulation of just 1% reduces the effectiveness of the insulation by 50%.

Lack of Insulation

Interstitial cavity



Uninsulated water lines run mid attic. In the summer homeowners are afraid toddler will get scalded if he turns on the cold water



Under-insulated/Poorly Run Ducts



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Broken Flex Duct



Photo courtesy of Judy Rachel

Wind washing

Vented Bay



Unintentionally Vented Bays



Same Attic. Which Can Light Can be In Contact with the Insulation?



Photo courtesy of Judy Rachel

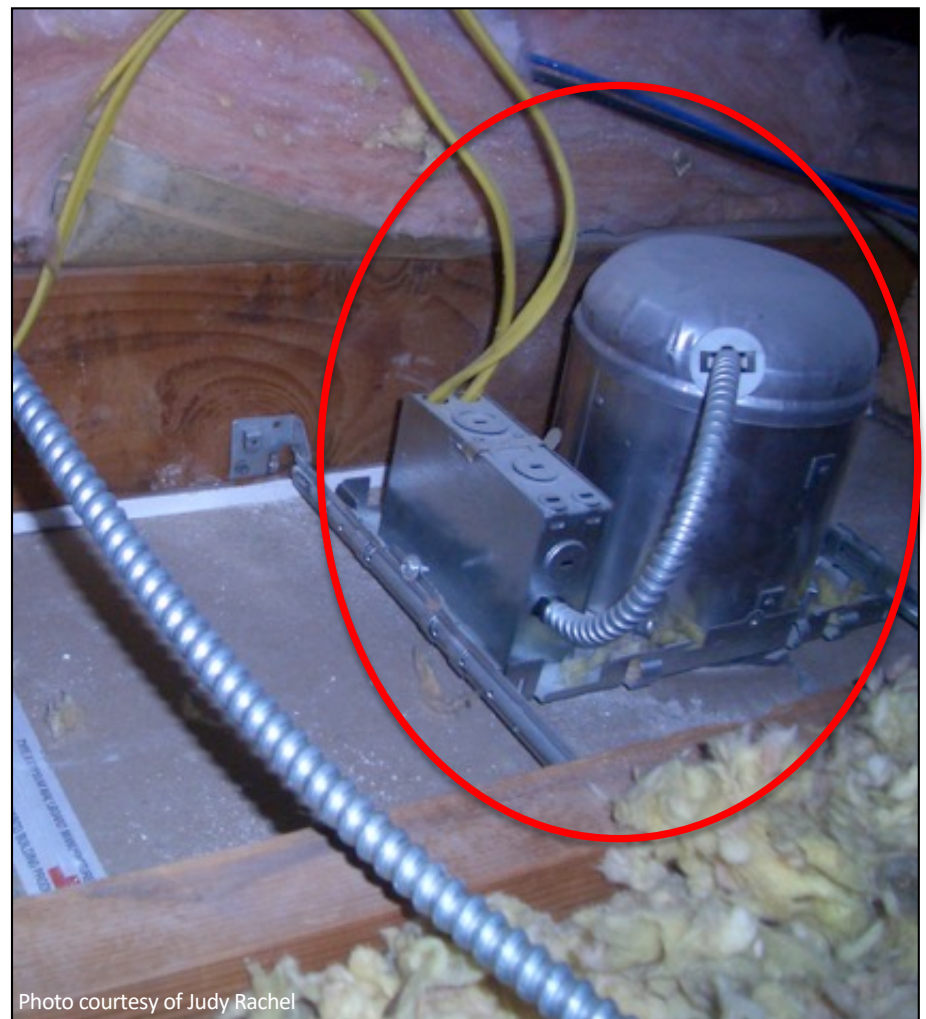


Photo courtesy of Judy Rachel

Evaluate Ventilation



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Evaluate Ventilation



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Properly Vented to the Outside



Junction Boxes Need Covers



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Fire Hazards

Chimney has no clearance to wood



Photo courtesy of Judy Rachel

Paper facing left exposed in attic



Photo courtesy of Judy Rachel

Health & Safety



Asbestos Containing Material



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

Mechanical Systems/Diagnostic Performance Tests



Energy Conservatory Duct Blaster

Heating System
Cooling System
Ventilation
Ducts
Water Heating

Performance Testing

- Blower Door
 - Quantify total leakage
 - Search for leakage paths
 - Assist with IR inspection
- Infrared Inspection
- Duct Leakage
 - Total duct leakage
 - Half Nelson
 - Leakage to outside
- Measure Airflow of HVAC Systems
- Heating Stratification Test
- Delivered Capacity
- Static Pressure
- Various Pressure Tests
- System Watt Draw
- Pool Pump Watt Draw



Photo courtesy of Judy Rachel

Blower Door

- Quantifies air leakage**
- Helps locate air leaks**
- Measures the effectiveness of air sealing efforts**
- Enhances infrared camera diagnostics**
- Necessary part of duct leakage to the outside test**

Find Air Leakage Pathways



Photo courtesy of Judy Rachel

Infrared Inspection



Provides the ability to locate:

- Air Leaks
- Thermal Bridging
- Missing or Poorly Performing Insulation
- Water Leaks



Photo courtesy of Judy Rachel



Fluke



Flir

Duct Testing



Total Duct Leakage



Duct Leakage to the Outside



Half Nelson



Photo courtesy of Judy Rachel



Duct Testing Equipment

Can also be used:

- ❑ As a powered flow hood to accurately measure total air flow through supply and return registers, exhaust fans and other air flow devices
- ❑ As a small Blower Door to test the airtightness of small or tightly built houses
- ❑ To accurately measure total air flow through the air handler using the plenum pressure matching procedure

Air Flow Measuring Devices

Delivered system air flow: the sum of the supplies

Ventilation systems

Exhaust Fans

Powered flow device compensates for pressure losses created by funneling air flow through a device.



Flow Finder®

Passive flow device where air is directed over a manifold which averages the velocity pressure. Less accurate than powered devices.



LoFlo Balometer

Heating Stratification Test



Home Temperature Stratification Test

Test Date: _____ Test Conducted By: _____

Owners: _____

Address: _____

Description of house and test conditions: _____

CBCA-Strat Test Measurements:	Start	Finish	Temperature Increase
Test start and finish times	_____	_____	Test Duration: _____
1. Floor level (6" above floor)	_____ °F	_____ °F	_____ °F
2. 1 st floor thermostat	_____ °F	_____ °F	_____ °F
3. 2 nd floor thermostat (2 story homes)	_____ °F	_____ °F	_____ °F
4. Ceiling level (6" below ceiling)	_____ °F	_____ °F	_____ °F

House Temperature Stratification Grade: _____ °F (line 4 minus line 1)

- Excellent Comfort** (floor to ceiling variations less than 3°F)
- Good Comfort** (floor to ceiling variations between 3°F and 6°F)
- Unacceptable High Comfort Levels** (floor to ceiling variations greater than 6°F)

Heating System Sizing: _____ °F (average temperature increase)

- Undersized Heating System** (average temperature increase less than 2°F/hour)
- Properly Sized System** (average temperature increase between 2°F/hour and 5°F/hour)
- Oversized Heating System** (average temperature increase greater than 5°F/hour)

Ceiling Heat Loss Increase due to Stratification: _____ °F (line 4 minus line 2)

- Low Ceiling Heat Loss** (ceiling temperature less than 2°F above thermostat temperature)
- Slightly Elevated Ceiling Loss** (ceiling temperature 2°F to 6°F above thermostat temperature)
- Unacceptably High Ceiling Heat Loss** (ceiling temperature 6°F above thermostat temp.)

Delivered System Capacity

Need measured air flows



Temperature of air at grilles



Total External Static Pressure

- Similar to taking a person's blood pressure to measure the “health” of the HVAC system
- Manufacturer's maximum acceptable TESP is on the equipment's label



Photo courtesy of Judy Rachel

Air Handler & Condenser Watt Draw

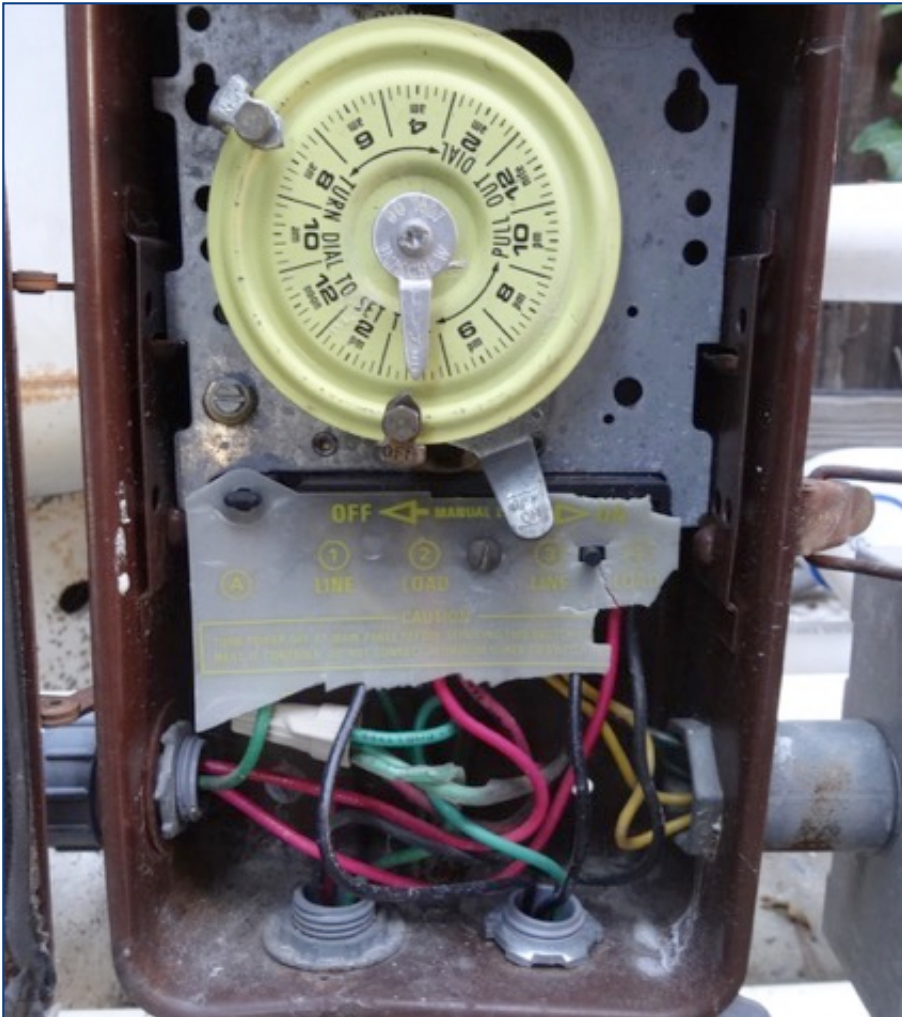


Photo courtesy of Judy Rachel

Pressure Across Doors With HVAC System On Should Never Exceed 3 Pa



Pool Pump Watt Draw



- Watt Draw of the pool pump multiplied by the number of hours the pump runs per day gives you total energy use of the pool pump.
- Extrapolate out for annual energy use and cost.



Photo courtesy of Judy Rachel

Combustion Appliances & Safety

Visual evidence of spillage on an induced draft furnace

Most homes still have combustion appliances typically for heating, water heating, cooking or drying clothes.

The by-products of combustion can cause serious health problems and even death

- Appliances that rely upon combustion must be vented properly to the outside
- Adequate air must be provided for the combustion process and for draft to be sustained
- Competition for air can cause combustion appliances to spill their vent gasses back into the home, cause flame roll-out or extinguish pilot lights, causing natural gas to build up in the area around the appliance.
- Tighter houses mean even greater vigilance is necessary to ensure proper venting

Combustion Safety Tests

- Visual Inspection
- Combustible Gas Leaks
- Worst Case Depressurization
- Spillage
- Draft
- Carbon Monoxide (CO)
- Oven and Stovetop CO

Hazardous Condition



Photo courtesy of Judy Rachel

Hazardous Condition



Photo courtesy of Judy Rachel



Photo courtesy of Judy Rachel

The Home Energy Audit

- Provides the vehicle for gathering information about a house from the occupant, through visual inspection and diagnostic testing.
- There are many factors that affect home energy performance. The auditor must be an expert in building science and the climates they work in.
- Figuring out moisture, air and heat movement in our homes is critical for durability, energy efficiency, comfort, safety and IAQ.



Compiling and reporting the results of the Energy Audit

PROPOSAL WRITING

Site Visit Findings Report

- Provide a written report containing the findings from the site visit.
- Provide a preliminary work scope
 - Use test-in data to guide post-retrofit test-out goals
- Prioritize recommended measures
 - Recommendations should reflect the needs of the home and its occupants
 - Present options for comprehensive solutions that are consistent with building science principles

HOME ENERGY FITNESS EVALUATION



Test Date: August 26, 2021

Prepared For: Jane & Joe Bioneer

Property Located at: 1234 Energy Hog Road
Clean Coal, Ca 987065

Evaluation by: Judy Rachel

Judy Rachel (818) 980-5985  Offering Sustainable Solutions

Site Visit Report

- Re-state Homeowner's concerns in their words
- Describe existing conditions & results of tests
- Make recommendations describing benefits
- Provide test data and pictures

Report Goals

1. Describe existing conditions in your home which are compromising your comfort, your health, the durability of the house and your pocketbook.
2. Describe options to obtain a healthy, evenly distributed comfort level throughout your home while lowering your utility bills.

SUMMARY

EXISTING CONDITION

✓ Safety Concerns

- ▶ Venting of Water Heater
- ▶ Water heater proximity to a sleeping area.
- ▶ Venting of Stove / Oven

✓ Building Durability

- ▶ Bathrooms Are Under-Ventilated
- ▶ Evidence of Moisture in the Crawlspace
- ▶ Evidence of Moisture draining and pooling in contact with the house's foundation

✓ Comfort / Energy Efficiency

- ▶ High Air Leakage Throughout House
- ▶ Roof Space Un-Insulated
- ▶ Poorly Performing Heating/Cooling Equipment.

RECOMMENDATIONS

- ✓ Install a Sealed Combustion water heater
- ✓ Install an Exhaust Fan over the stove
- ✓ Install a low-level Carbon Monoxide Monitor in the kitchen
- ✓ Install Exhaust Fans in the hall bathroom and guest suite bathroom
- ✓ Install Plastic on top of the crawlspace soil.
- ✓ Monitor Relative Humidity Levels to determine if the RH is ever exceeding 65% for any prolonged period of time.
- ✓ Re-direct Rain Gutter Downspouts away from the foundation
- ✓ Re-direct Condensate Line to drain without pooling water at the foundation.
- ✓ Evaluate landscape watering system and strategies in proximity to the foundation to minimize watering the house.
- ✓ Create a barrier to air movement at the roof to the conditioned living space.
- ✓ Seal all passive ventilation through the wall system.
- ✓ Stop air leakage through the Floors of the Living Room, Office, Hall, Bathroom and Bedroom.
- ✓ Insulate on top of the Roof deck
- ✓ Replace HVAC System with a well-installed, better heating / cooling strategy appropriate for the challenges of the house's architecture.

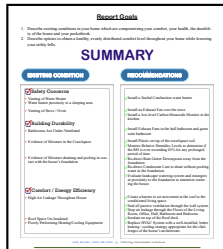
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The Structure of Effective Proposals



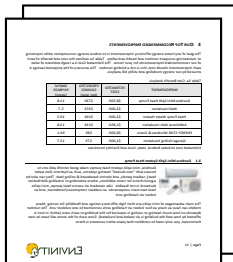
Cover Sheet

Be as creative as you want (or not)



Part I

List of client concerns, needs and wants
What the client knows



Part II

Measurements and observations
What you know now, and why it matters



Part III

Recommendations, costs and benefits
Everything else

Work Scope

HOME PERFORMANCE
PROFESSIONALS

310-123-4567
CA Lic# 901234

Work Scope

1. ATTIC RETROFIT

Air seal and insulate the ceiling assembly as accessible. Benefits to the homeowner include reduced operating cost, lower energy consumption, and improved energy efficiency.

- Remove old fiberglass insulation
- Install attic cat walks
- Install eave vent baffles as needed.
- Install foam baffles in vaulted roof sections around perimeter (Approximately 30 2' x 4' baffles)
- Air seal attic penetrations, and wall top plates
- Seal interstitial cavity
- Air seal and insulate knee walls
- Insulate attic hatches
- Install attic rulers.
- Re-duct bath fan
- Insulate plumbing in attic
- Blow in Cellulose insulation to R38, and bury ducts in insulation.
- Verify insulation install with bag count and inspection.
- Inspect insulation with infrared camera
- Run blower door to verify air infiltration
- Report test out data to customer

\$7498.00 (Materials 2578.12, Labor 4919.88, estimated time 4 to 5 days)

2. INSULATE WALLS

Insulate exterior walls where accessible. Benefits to the homeowner include reduced operating cost, lower energy consumption, and improved energy efficiency. Inaccessible walls will include part of the kitchen, living room and master bath behind the shower.

- a. Cut a one foot belly band in building drywall.
- b. Remove existing fiberglass insulation.
- c. Dense pack walls with Cellulose insulation.
- d. Install new drywall in belly band.
- e. Tape texture and paint not included.

- Development of a scope of work is one of the main goals of the home energy audit
- A description of the work to be performed with the goal of providing solutions based on your test-in findings and occupant complaints.
- Defines and identifies project expectations in writing including goals, targets and costs

Typical Work Scope

Home Performance work scopes typically include:

- Removal of equipment which will be replaced
- Fixing any deferred maintenance / moisture problems
 - Correct wiring hazards
- Removal of dirty, poorly installed insulation
- Air seal attic
 - Replace non-insulation contact, non-air tight can lights
- Air seal crawlspace (if present)
 - Install ground source vapor barrier (GSVB)
- Install right-sized HVAC equipment including new ductwork
- Install new insulation

Summary

- An opportunity to fully inspect the home
- Use all your observation skills, building science and construction knowledge
- Use diagnostic testing to further inform your observations
- Provide recommendations and create a work scope that provides value to the homeowner



Judy Rachel

Home Performance Pro

info@judyrachel.com

Closing

- Continuing Education Units Available
 - Contact info@3c-ren.org for any 3C-REN questions.
- Coming to Your Inbox Soon!
 - Slides, Recording, & Survey – Please Take It and Help Us Out!
- Upcoming Courses:
 - February 8 - [Retaining Profit – Minimize Call Backs on Heat Pump Installs](#)
 - February 13 - [Elements of a Whole House Assessment: The Home Energy Audit Explained](#)
 - February 14 - [Energy Code Implementation: Single Family New Construction](#)
 - February 20 - [Practical Ways to Address Embodied Carbon](#)
 - February 27 - [Residential Load Calculation and Duct Design for Building Departments](#)
- Visit www.3c-ren.org/events for our full catalog of trainings.



Questions about Title 24?

Energy Code Coaches are local experts who can help answer your Title 24 questions. Coaches have decades of experience in green building and energy efficiency improvements. They can provide citations and offer advice for your project to help your plans and forms earn approval the first time.

Online:
3c-ren.org/codes

Call:
805.781.1201





Thank you!

For more info:
3c-ren.org

For questions:
info@3c-ren.org



TRI-COUNTY REGIONAL ENERGY NETWORK
SAN LUIS OBISPO • SANTA BARBARA • VENTURA