

WHAT TO LOOK FOR IN A PROVIDER

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“STARTING ON A FIRM FOUNDATION”

HOW TO SHOP FOR A PROVIDER

DOES YOUR MARKET OFFER CHOICES IN PROVIDERS?

- BASED ON YOUR BUSINESS MODEL DETERMINE YOUR MOST IMPORTANT NEEDS & WHO CAN BEST MEET THEM.
- DO RESEARCH.
- ASK FOR REFERENCES.
- HAVE PROVIDERS COMPETE FOR YOU. SELL YOURSELF!
- FIND OUT WHO IN THE PROVIDERS ORGANIZATION YOU WILL BE ACCOUNTABLE TO.
- ASK IF THEY HAVE A CUSTOMER SERVICE STATEMENT AND/OR CODE OF ETHICS.
- CONSIDER ANY ALLEGIANCES WITH YOUR CURRENT PROVIDER.
- DON'T BE AFRAID TO ASK QUESTIONS.

KEY ISSUES

- TRAINING
- FINANCIAL ISSUES
- TECHNICAL SUPPORT
- BUSINESS DEVELOPMENT
- PROVIDER PROGRAMS/SERVICES
- SOFTWARE
- PROMOTION/MARKETING
- REQUIREMENTS FOR RATERS
- INDUSTRY REPRESENTATION
- LEGAL ISSUES

PROVIDER TRAINING

- RATER TRAINING MUST BE PROVIDED BY A **RESNET** ACCREDITED RATER TRAINER PROVIDER.
- WHAT IS THE TIME FRAME FOR COMPLETING TRAINING REQUIREMENTS?
- IS THERE A MENTORING PROCESS AVAILABLE OR REQUIRED DURING OR AFTER RATING CERTIFICATION?
- WHAT CONTINUING EDUCATION OPPORTUNITIES ARE OFFERED OR REQUIRED BY YOUR PROVIDER?
- HOW OFTEN MUST YOU BE RECERTIFIED?
- DOES THE PROVIDER OFFER RATER BUSINESS MANAGEMENT TRAINING?
- DOES THE PROVIDER CONDUCT CONSUMER, BUILDER, LENDER, REALTOR OR TRADE ALLY TRAINING?

PROVIDER FINANCIAL ISSUES

- HOW MUCH IS THIS GOING TO COST?

SOFT WARE FEES

PROCESSING FEES

CONSULTING FEES

TRAINING FEES

EQUIPMENT FEES

THE ANSWERS TO THESE QUESTIONS WILL HELP YOU TO
DETERMINE HOW MUCH YOU ARE GOING TO CHARGE.

- WILL YOUR PROVIDER ASSIST YOU IN FINANCIAL PLANNING
FOR YOUR BUSINESS?

PROVIDER TECHNICAL SUPPORT

QUESTION THE AVAILABILITY OF SUPPORT FOR THE FOLLOWING:

- HOW TO USE COMPUTER SOFTWARE
- ON COMPUTER HARDWARE ISSUES
- ADVISE ON HOW TO BEST IDENTIFY AND MODEL BUILDING COMPONENTS.
- FACILITATING TESTING EQUIPMENT CALIBRATION
DOES THE PROVIDER REQUIRE SPECIFIC TIME FRAMES FOR CALIBRATION?

PROVIDER BUSINESS DEVELOPMENT

- IS BUSINESS MANAGEMENT TRAINING OFFERED?
- IS BUSINESS MANAGEMENT CONSULTING AVAILABLE? IS THERE A COST ASSOCIATED WITH THIS SERVICE?
- DOES THE PROVIDER FACILITATE DISCOUNTS WITH SUPPLIERS?
- DOES THE PROVIDER OFFER A TESTING EQUIPMENT PURCHASE PLAN (ZERO OR LOW INTEREST FINANCING) OR DO THEY OFFER TESTING EQUIPMENT RENTAL?
- IS THE PROVIDER WILLING TO HELP WITH DEVELOPING NEW BUILDER PARTICIPATION IN OFFERED PROGRAMS?
- WHAT KIND OF MARKETING OPPORTUNITIES DOES THE PROVIDER HAVE? HOW WILL THEY WORK WITH YOUR GOALS?

PROVIDER PROGRAMS

- WHAT NATIONAL OR LOCAL PROGRAMS ARE THE PROVIDER AFFILIATED WITH? ENERGY STAR, BUILDING AMERICA, STATE ENERGY PROGRAMS, UTILITY PROGRAMS, PRIVATE INDUSTRY, ETC.
 - UNDERSTAND THE DIFFERENCES BETWEEN PROVIDER AND RATER RESPONSABILITIES.
- ARE YOU AND YOUR SOFTWARE APPROVED FOR THESE PROGRAMS?
- HOW LONG IS THE PROVIDER COMMITTED TO CURRENT PROGRAMS AND SOFTWARE AND ARE THEY OPEN TO CONSIDERING ADOPTING NEW PROGRAMS/SOFTWARE NOT CURRENTLY OFFERED/USED?
- WHAT DO THEY HAVE IN THE WORKS?
- WHAT ARE THE OPPORTUNITIES FOR YOU AS A RATER?

PROVIDERS SOFTWARE

- IS USE OF SPECIFIC SOFTWARE REQUIRED?
- HOW DID THE PROVIDER CHOOSE THE REQUIRED SOFTWARE?
- IS THE PROVIDER THE ADMINISTRATOR (LICENSE HOLDER) OF THE RATING SOFTWARE? ARE THEY RESPONSIBLE FOR DISTRIBUTION, UP-DATES, AND MONITORING THE USE OF THIS SOFTWARE?
- ARE YOU REQUIRED TO SIGN A SOFTWARE LICENSING AGREEMENT? AND IF SO WHAT LIMITATIONS DOES THIS PLACE ON ITS USE?
- DOES THE SOFTWARE MEET THE NEEDS OF YOUR BUSINESS? EXISTING HOMES, NEW CONSTRUCTION, CODE COMPLIANCE, MULTI-FAMILY, ETC.?
- WHAT KINDS OF REPORTS ARE AVAILABLE FROM THE SOFTWARE?

PROVIDER SERVICES

- WILL THEY PROVIDE A QUALITY CONTROL FUNCTION? IF SO HOW IS THIS ACCOMPLISHED?
- DO THEY HAVE A RATER/PROVIDER AGREEMENT THAT SPELS OUT REQUIREMENTS AND EXPECTATIONS?
- WILL THEY BE RESPONSIVE TO SUGGESTIONS, QUESTIONS AND PROBLEMS THAT ARISE?
- WILL YOUR PROVIDER MAINTAIN A DATABASE OF YOUR WORK? WILL THIS INFORMATION BE SHARED AND HOW?
- WILL THE PROVIDER PROCESS YOUR RATINGS IN A TIMELY, ACCURATE AND COMPLETE MANNER?

PROVIDER PROMOTION/MARKETING

- WHO ARE THE PROVIDERS OTHER CLIENTS?
- IS THE POTENTIAL PROVIDER A RATER AS WELL? AND IF SO ARE THEY TARGETING YOUR POTENTIAL CLIENTS?
- DOES YOUR PROVIDER OFFER MARKETING TRAINING?
- IS THE PROVIDER PART OF A PROGRAM THAT WILL PROMOTE YOU AS WELL?
- WOULD THERE BE CO-OP ADVERTISING FUNDS AVAILABLE?
- ARE THERE INCENTIVES FOR YOU FOR PROMOTING THE PROGRAM?
- ARE YOU ON YOUR OWN OR CAN YOU RELY ON YOUR PROVIDER FOR IDEAS?

PROVIDERS REQUIREMENTS FOR RATERS

- HOW MUCH AND WHAT KIND OF INSURANCE COVERAGE WILL YOU BE EXPECTED TO CARRY BY THE PROVIDER?
- WHAT ARE THE LICENSE REQUIREMENTS, CODE OF ETHICS, ETC.?
- WHAT KIND OF CUSTOMER SERVICE AND WARRANTY IS EXPECTED?
- ARE THERE RESTRICTIONS IMPOSED BY THE PROVIDER ON MARKET TERRITORY, TYPES OF RATINGS YOU CAN PERFORM, ETC.
- WHAT ARE THE CONTINUING EDUCATION REQUIREMENTS?
- WHAT AGREEMENTS OR CONTRACTS DO YOU HAVE TO SIGN WITH THE PROVIDER?

PROVIDERS INDUSTRY REPRESENTATION

- WILL THE PROVIDER REPRESENT ITS RATERS THROUGH LOCAL GOVERNMENT, NATIONAL ASSOCIATIONS, HOME BUILDERS ASSOCIATIONS, ETC.?
- DOES THE PROVIDER PROMOTE, SUPPORT AND TRAIN THE LOCAL LENDING, APPRAISAL AND REAL ESTATE INDUSTRIES?
- WILL THE PROVIDER CONVEY YOUR NEEDS AND CONCERNS TO *RESNET*, *EPA*, ETC.
 - HOW WELL DO THEY UNDERSTAND THESE PROGRAMS OR ORGANIZATIONS?

PROVIDER LEGAL ISSUES

- CAN YOU UTILIZE MORE THAN ONE PROVIDER?
- LIABILITY. WHO IS RESPONSIBLE FOR WHAT, (THE PROVIDER, RATER, SUB-CONTRACTOR)?
- OWNERSHIP. WHO ARE YOU WORKING FOR AND WHAT ARE THE TERMS AND CONDITIONS?
- DISPUTES. WHO HANDLES THEM AND HOW?
- CONTRACTS. WILL YOU HAVE ONE?

THINGS TO CONSIDER

- WHAT IS THE LONG TERM VIABILITY OF POTENTIAL PROVIDERS BEING CONSIDERED?
- WHAT IS YOUR POTENTIAL PROVIDERS LONG TERM VISION OR STRATEGIC PLAN AND HOW DOES THAT MESH WITH YOUR BUSINESS PLANS?
- COMPATABILITY. PERSONALITIES MATTER.
- HOW DOES THE PROVIDER DISTINGUISH BETWEEN EXISTING HOMES AND NEW HOMES? ARE THERE DIFFERENT REQUIREMENTS OR STRATEGIC PLANS IN PLACE FOR EACH?
- WILL YOU BE AN INDEPENDENT BUSINESS OR IS BEING AN EMPLOYEE OF THE PROVIDER AND OPTION?

MORE THINGS TO CONSIDER

- HAVING THE ROLES OF PROVIDER AND RATER DEFINED IS IMPORTANT.
- WILL THEY BE AVAILABLE AND RESPONSIVE TO PROBLEMS THAT ARE ENCOUNTERED, QUESTION OR CONCERNS YOU MIGHT HAVE?
- WHO IS THE PROVIDER ACCOUNTABLE TO?
- WHAT IS THE PROVIDERS RELATIONSHIP WITH *RESNET* AND HOW WELL DO THEY UNDERSTAND *RESNET* REQUIREMENTS?
- WHEN MIGHT IT BE APPROPRIATE FOR YOU TO BECOME A HERS PROVIDER? WHAT ARE THE DIFFERENCES IN RESPONSIBILITIES, COSTS, ETC?