



# GreenMLS/Better Buildings Roundtable

## Final Report & Meeting Summary

**CNT Energy - a division of the Center for Neighborhood Technology**

CNT Energy  
Center for Neighborhood Technology  
2125 West North Avenue  
Chicago, IL 60647  
Phone: (773) 269-4037  
E-mail: [info@cntenergy.org](mailto:info@cntenergy.org)  
[www.cntenergy.org](http://www.cntenergy.org)  
[www.cnt.org](http://www.cnt.org)

# Contents

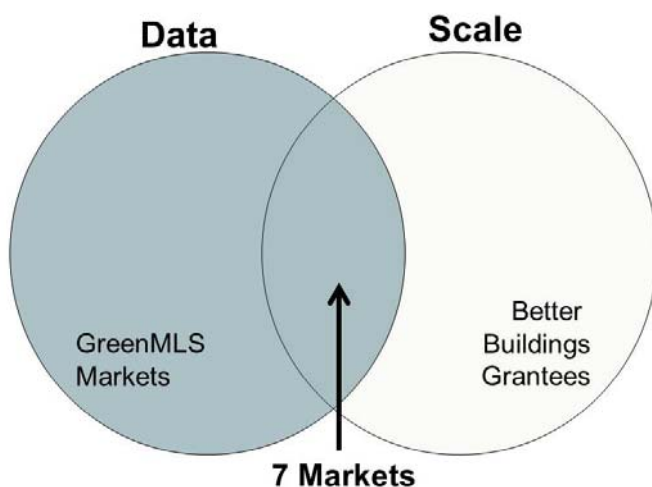
<b>Section 1 - Summary Overview</b>	Page 3
Project Overview	
Roundtable Highlights	
Results Summary	
Closure & Next Steps	
<b>Section 2 - Direct Outcomes from Roundtable</b>	Page 9
Sharpened Local Focus	
Advanced National Momentum	
Local Results	
National Progress by Major Themes	
Progress Summary	
<b>Section 3 - Agenda Recap and Outcomes</b>	Page 15
Webinar - Wednesday, September 14th	
Roundtable - Wednesday, September 28th	
Roundtable - Thursday September 29th	
<b>Section 4 - Attendees</b>	Page 20
Better Buildings Grantees	
National Organizations	
Local Organizations	
<b>Section 5 - Next Steps</b>	Page 22
90 Day Plan	
Other Next Steps	
Subsection 5C Title	
<b>Section 6 - Recommendations</b>	Page 23
<b>Section 7 - Assessment &amp; Performance</b>	Page 24
Meeting Evaluation	
Attendee Survey Results	
Budget Performance	
<b>Section 8 - Conclusion</b>	Page 26
<b>APPENDIX I: Summary of MLS Grant Work &amp; Progress</b>	Page 27

# 1. Summary Overview

## Project Overview

The GreenMLS/Better Buildings Roundtable event was an effort to accelerate fair value at closing for energy efficient homes. The roundtable focused on communities where the inventory of homes with energy efficiency improvements is expected to grow. Both bottom-up and top-down approaches were employed.

Event organizers first selected seven residential Better Buildings Neighborhood Program (BBNP) grantees from different climate regions. These BBNP grantees are receiving funds to accelerate residential retrofits through 2013. Each has been asked to identify opportunities to ensure ongoing demand after the grant period ends. Building energy efficiency data into the real estate market could influence value and is one tactic to drive demand.



Once the markets were identified, real estate experts were invited. Invitations were extended to a staff member from the local MLS, a Realtor and an appraiser. Then national experts on home performance, MLS, real estate, appraisal and other subject areas were recruited. In total, 35 people attended the roundtable in person. Others participated in webinars and research.

The Roundtable was held over one and a half days. The agenda followed the bottom-up and top-down approaches.

Beginning with the top-down perspective, attendees discussed barriers and opportunities. They made progress in understanding the value-at-resale community, to which they all belong, and attempted to find agreement on a common lexicon for shared areas of concern such as definitions for verifications vs. certifications. They agreed on some key themes in need of further exploration and met in small groups to define opportunities. These topics included:

- Mutual data requirements
- Reporting market trends
- Stakeholder/consumer engagement
- Appraisal integration
- Finance industry engagement

Next, the group split up by geography to take a bottom-up look at the same topics. Each group made progress on at least one problem or opportunity. These breakthroughs included: identifying

potential areas of improvement with the MLS; commitments to work together more effectively; and tactical ideas for better Realtor education.

On the final morning of the roundtable, a smaller group of met to discuss national issues again with a top-down perspective. They looked at the two mutually-agreed top concerns that surfaced during the roundtable: valuation for efficiency performance, and education of stakeholders.

At the end of the roundtable, each of the seven BBNP had made significant commitments to advance local goals for sustainable demand for efficient homes, and three institutional players (Appraisal Institute, Buildings Performance Institute, National Association of Realtors) left with specific action items to implement upon returning home. The group was clear on immediate next steps focused on further knowledge-sharing, and the sponsoring group (CNT Energy) was clear on a 90-day plan to develop some of the fresh ideas that surfaced during the roundtable.

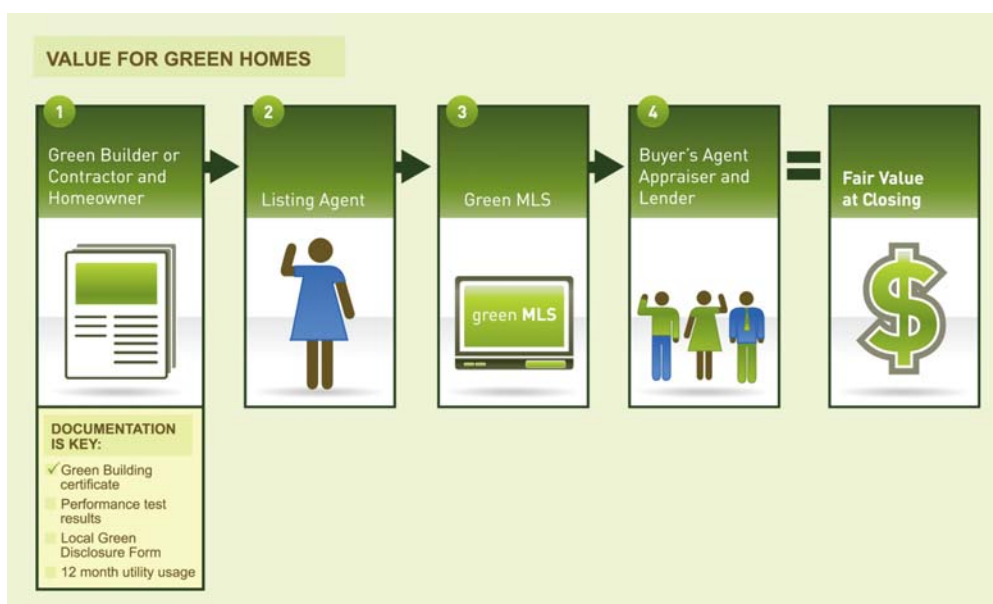
# Roundtable Highlights

## Major Themes

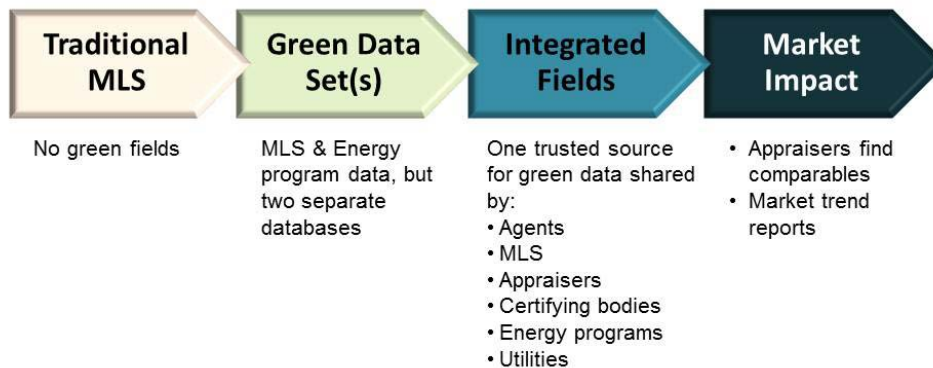
- Performance metric to assess value
- Education
- Stakeholder engagement

## Big Breakthroughs

1. We represent different stakeholders among one community, and we share a common goal—value at resale.



2. The continuum for progress is clear.



### 3. Data Standardization is critical.

There are very different data needs:

- The real estate community must have data points directly from the source (builders, home sellers, certifying organization) in order to promote and value efficiency features during resale.
- MLS prefer streamlined offerings of certifications and ratings (reduces liability and limits the size of the database).
- But Appraisers seek multiple data points, organized in searchable ranges when relevant, to compare listings and assess value (certifications, scores, utility history and feature sheets).

There is a need for a trusted, third-party source of data:

- Many Inputs by address:
  - Certification/rating details
  - Closed sales prices
- Many Outputs:
  - Direct MLS feeds (access for agents and appraisers)
  - Underwriter access

## Barriers Limit Potential

### 1. There is no data alignment across industries.

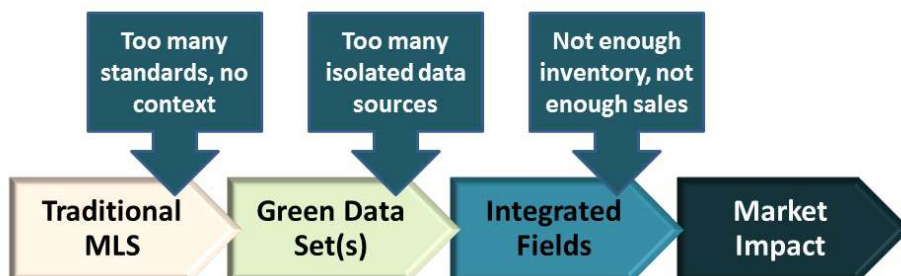
- Each industry generates its own data collection form.
- No metric exists to support valuation.

### 2. Education is not aligned across targets.

- Product side: builders, contractors, efficiency programs
- Sales/financing side: agents, lenders, appraisers, underwriters

### 3. GreenMLS not used enough, and is not always used as designed.

### 4. GreenMLS is not linked to pull consumer demand.



## Fresh Thinking

**1. The car industry has Carfax. We need Housefax—a central, trusted source for green history by address.**

**2. There is no established standard to certify an existing home.**

- BPI will commit to create an energy efficiency certification for existing homes.

**3. Appraisers don't have the data they need to value a green home.**

- Appraisal Institute now offers a Green & Energy Efficiency Addendum, released on September 30, 2011 as a direct outcome of the Roundtable.

**4. NAR could offer a GreenMLS “stamp of approval.”**

- This would be based on minimum Quality Assurance criteria.
- NAR's SecureSafe sets precedence.

## Lessons Learned

**1. MLS serve Realtors/agents first, then appraisers.**

- Realtors benefit when appraisers use the MLS and listings appraise out at the contract price
- Realtors need limited fields to promote and search for properties
- Appraiser field needs are much more complex – adds time and costs for MLS to design for appraisers

**2. There are walls between Realtors/agents, appraisers and underwriters.**

- These walls pinch progress toward value (see graphic below).
  - Realtors fear litigation and prefer to use minimum fields required to make a property appealing to the market.
  - Appraisers need to compare ranges of properties to determine market value.
  - Underwriters are looking to identify and eliminate outliers to reduce risk.

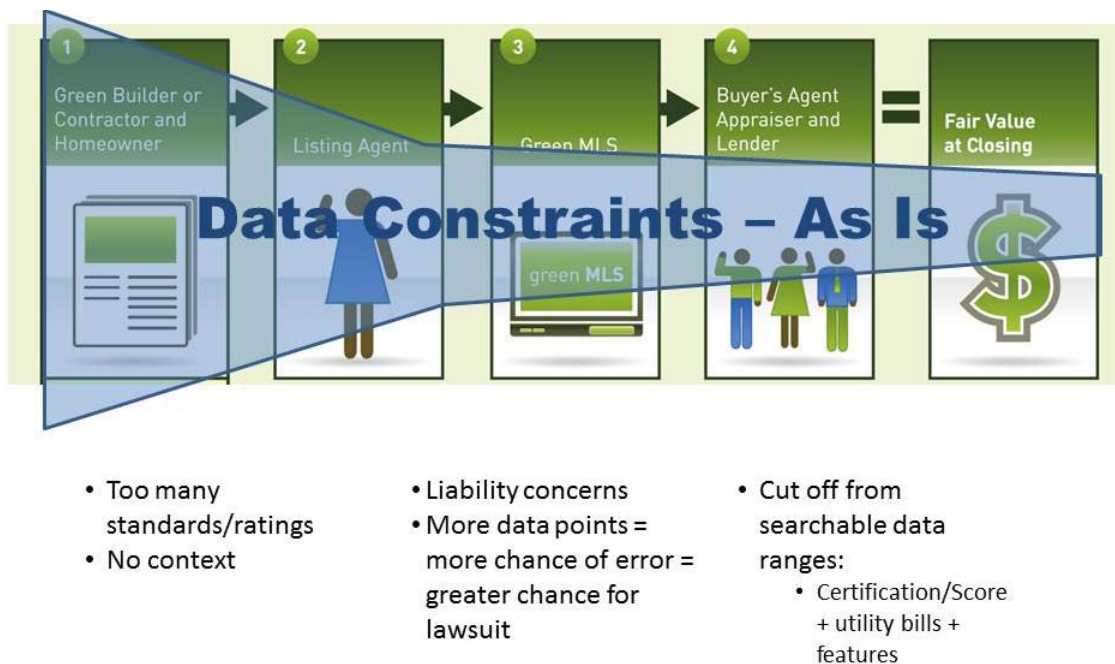
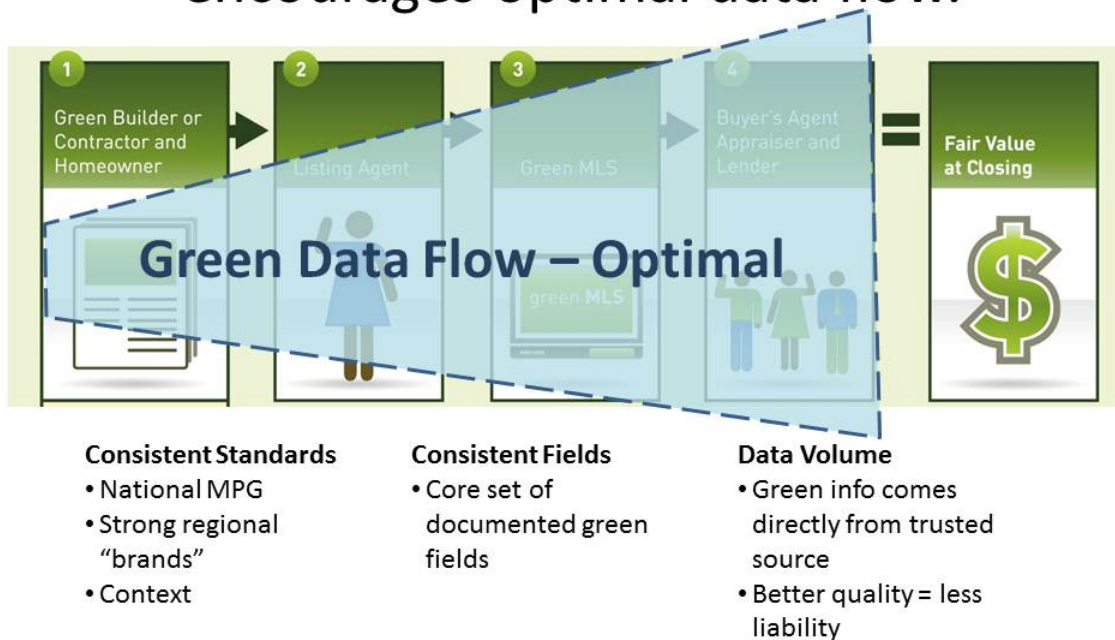
Lack of established standards and ratings makes it very difficult for MLS operators and appraisers.

- Which standards and ratings matter?
- How do they relate?

In general, real estate community needs to be *pulled* towards more focus on green/efficient homes

- Data sells the point
- Success stories are critical

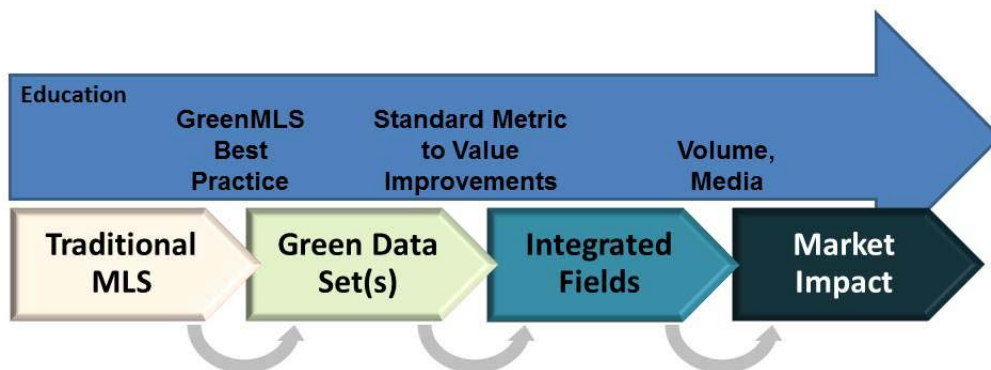
## More data, from trusted sources encourages optimal data flow.



# Results Summary

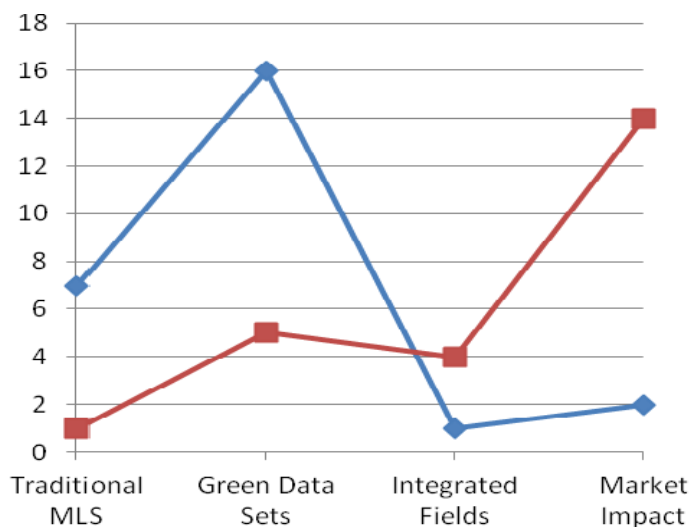
## Priority Areas

1. Create a clear path for valuing green and energy efficiency improvements.
2. Create a Roadmap for the big pieces.
  - Finance
  - Valuation metric (established metric to link performance savings to value)
  - Education and outreach



## Potential Impact

A post-event survey indicated that if the roundtable outcomes are developed, it would accelerate GreenMLS progress from green data sets/silos to market impact.



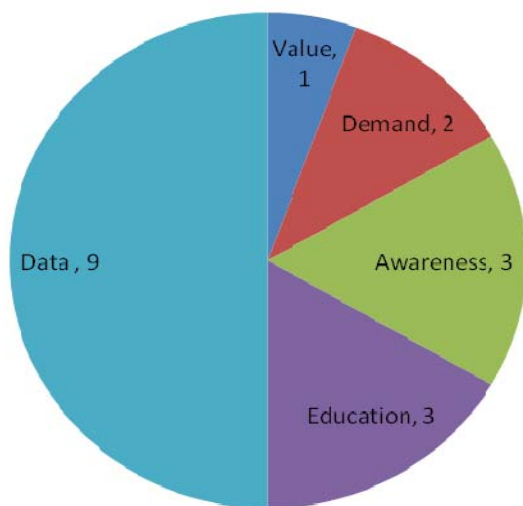
The blue points represent participants' views on the current state of progress along the GreenMLS continuum. The red points represent where participants believe the market can move if Roundtable ideas are implemented. Each participant had the option to select one choice for each question.

## Closure & Next Steps

- 90 Day Plan - Making some quick wins and scoping opportunities for 2012. Stay tuned.  
Focus areas:
  - Prove it. (green premium success stories)
  - Smooth it. (data sharing)
  - Move it. (education and outreach)
  
- Linked In Group – On-going laboratory behind the scenes to share interim successes, seek help and share ideas.  
[http://www.linkedin.com/groups?gid=4112229&goback=%2Eanp\\_4112229\\_13176583898\\_93\\_1](http://www.linkedin.com/groups?gid=4112229&goback=%2Eanp_4112229_13176583898_93_1).
  
- January, 2012 webinar for progress updates from each of the seven grant communities and national updates. Now is the time to start working on what you are going to talk about.

## 2. Direct Outcomes from the Roundtable

### Roundtable Participation Sharpened Local Focus



Prior to Invite - Reported Work Underway (based on individual responses)

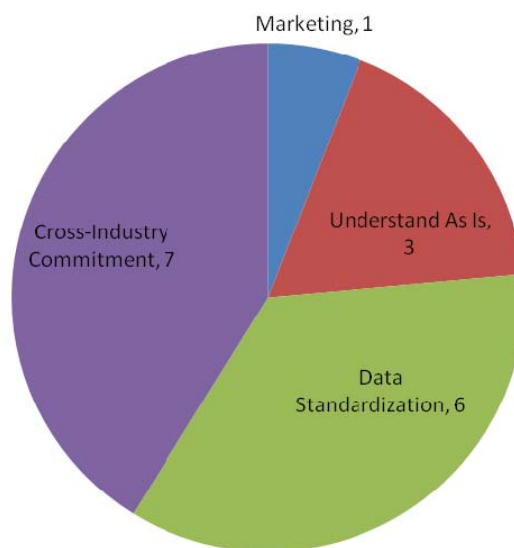
Participants were surveyed before, during, and after the roundtable to identify ways the roundtable influenced real estate integration plans and progress in BBNP markets. Leading up to the roundtable, participants were focused mostly on data discussions.

After receiving the roundtable invitation, participants in three communities met and began collaboration. Participants in two other communities made commitment to begin collaboration.

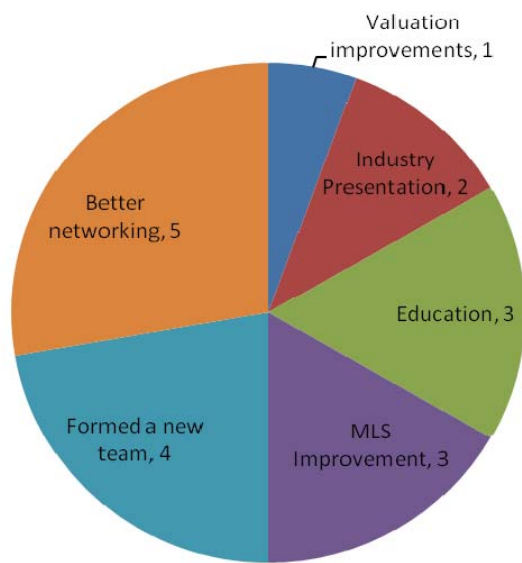
During the roundtable, most participants saw local progress in two main areas: data standardization and cross-industry collaboration.



As a Result of Invitation - Reported Work Underway (based on BBNP community)



During Roundtable - Progress Reported (individual responses)

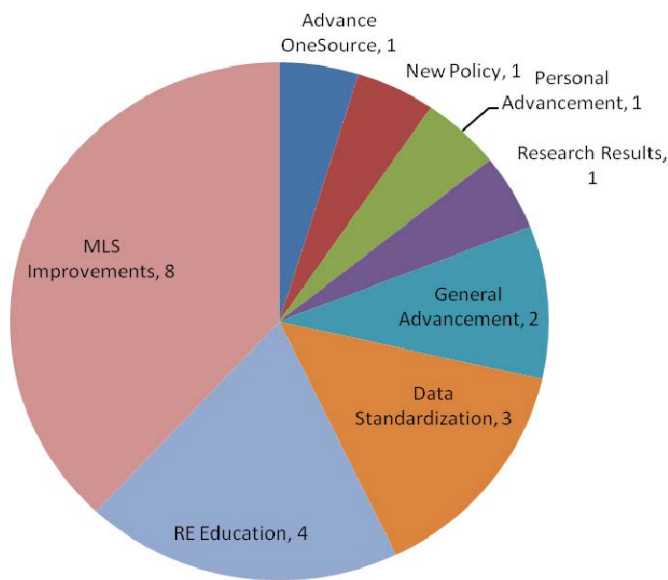


Projected Progress – First 14 Days after Roundtable (individual responses)

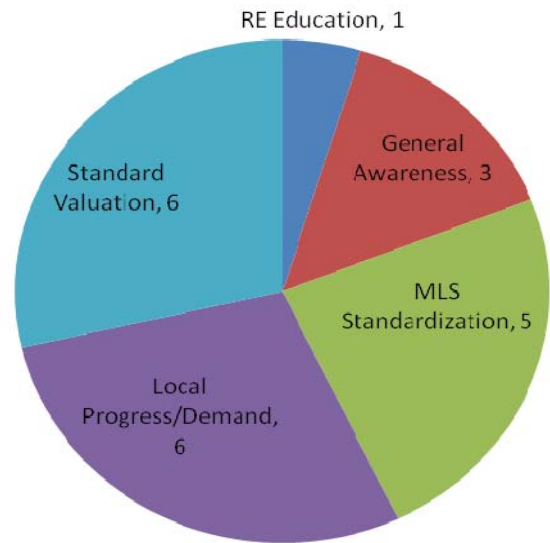
In the first 14 days following the roundtable participants saw progress across a variety of areas including education, MLS improvement, team-building and networking.

Looking ahead to the planned January, 2012 checkpoint, participants anticipated accelerated progress in key areas: MLS improvement, real estate education and data standardization.

Looking further to the end of the DOE grant funding in 2013, participants anticipated accelerated progress primarily in the areas of MLS improvements, data standardization toward a metric that links performance achieved to value and local progress and demand for efficient homes.



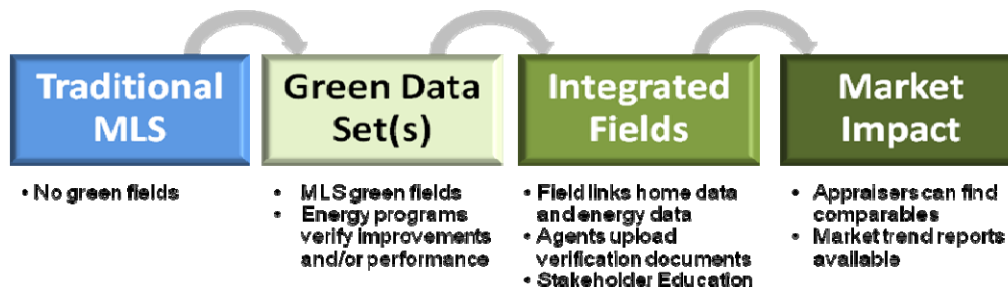
Projected Progress – January, 2012 (individual responses)



Projected Progress – At expiration of Better Buildings Grant Period (2013) (individual responses)

## Roundtable Advanced National Momentum

Leading up to and during the roundtable, participants used a continuum that represents the phases MLS markets go through as they work on GreenMLS initiatives. The continuum was developed by CNT Energy based on industry evaluation and participant feedback.

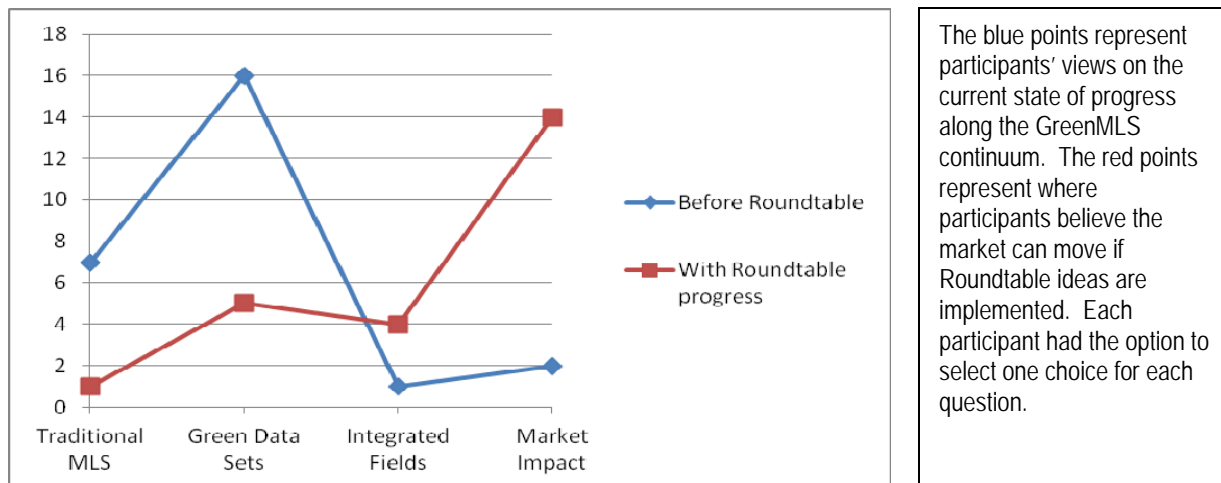


The four phases along the GreenMLS Market Continuum are:

- **Traditional MLS** – No green fields
- **Green Data Sets** – Green fields are available in the MLS and local energy programs also track and record residential green features (certificates earned, energy savings achieved) but the data sets are managed separately and not linked
- **Integrated Fields** – MLS and energy communities are coordinated through a collaborative process (long-term vision would be automated data feeds). Collaborative design improves the quality of green data and provides direct access to third-party verified information about green features and certifications. The end result is reduced liability for MLS operators and real estate agents.
- **Market Impact** – The number and quality of green listings in the MLS are at scale to allow appraisers to efficiently assess the value of green properties. It is also possible to conduct research to evaluate how market time and values compare between green and traditional properties.

Participants were asked to evaluate progress along the GreenMLS Market Continuum before the Roundtable, and as a result of Roundtable outcomes.

Where was your market on GreenMLS continuum before the Roundtable? (blue)  
Where will it go if Roundtable outcomes are successful? (red)



## Local Results

### As a result of being invited to the roundtable:

- BBNP met with local real estate associations, which led to ideas for improving our MLS.
- BBNP was inspired to move forward with work on a whole house energy efficiency upgrade certificate.
- Local MLS reviewed training material regarding green fields and resolved to update it.
- BBNP and local agents agreed to support GreenMLS field design update. Final field recommendations have been drafted and are in the queue for approval by the technology committee.

### During Roundtable:

- BBNP and real estate advocates set goals regarding energy ratings, uploading documents and training.
- BBNP and real estate advocates decided to create a home energy makeover contest for Realtors only.
- BBNP and real estate advocates defined partnership goals.
- BBNP and real estate advocates identified missing information in the MLS, which we can work to collect. The meetings highlighted the need to collect information which will be useful for our appraiser members.

## Within 14 Days of Roundtable:

- MLS operator reported the roundtable outcomes at Colorado Association of Realtors convention on October 4.
- Realtor and energy rater trainer in California has started delivering the Green Appraisal Addendum in classes (First classes: Oakland, CA Realtors, Los Angeles EEMs, with more scheduled).
- BBNP talked with the County Assessor's Office about the idea of using their database to archive the energy efficiency upgrades as a property passes from one owner to another.
- Realtors formed the Home Performance Project Team at local Realtor association with BBNP. The goal is to develop the marketing/engagement plan for the real estate community, and specifically to target some high profile realtors to participate.
- CSG scheduled an update with Realtors in New York with regard to roll out of Energy Efficiency Profile for MLS listings.

## National Progress by Major Themes

### During Roundtable:

**Valuation** - Appraisal Institute released Green & Energy Efficiency Addendum.

- [http://www.appraisalinstitute.org/education/downloads/AI\\_82003\\_ReslGreenEnergyEffAddendum.pdf](http://www.appraisalinstitute.org/education/downloads/AI_82003_ReslGreenEnergyEffAddendum.pdf)
- Cross-promoted by:
  - National Association of Realtor and NAR Green Resource Council
  - Buildings Performance Institute
  - RESNET
  - Home Energy Pros
  - Several MLS Operators

### Within 14 Days of Roundtable:

#### Valuation

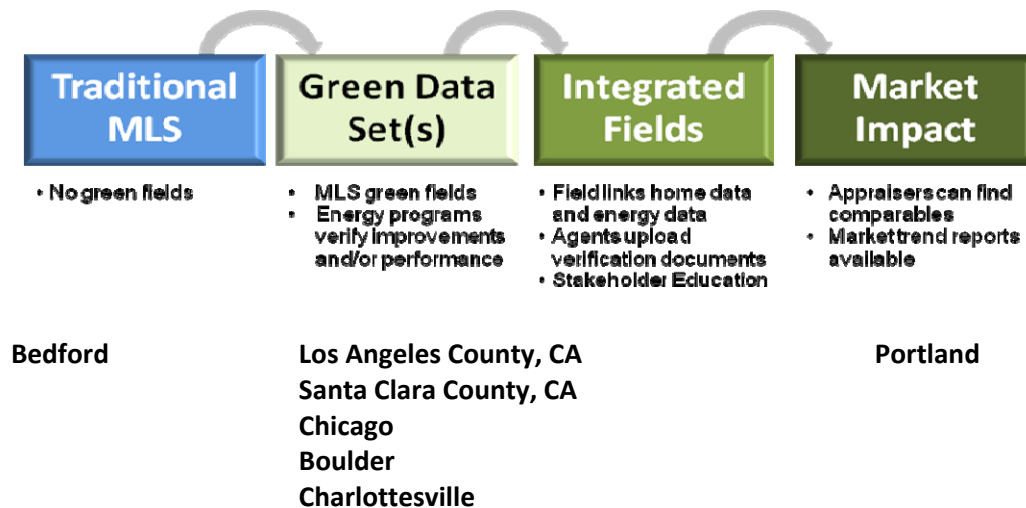
- Complete BPI Title and Scope for certificate standard.
- NAR and Efficiency First to assist in webinars on the new green addendum.
- Formed a working group to look at how to generate more interest and buy in from the real estate community on valuing energy efficiency.
- Appraisal Institute evaluating reintroducing GREEN Act.
  - <http://www.govtrack.us/congress/bill.xpd?bill=h111-2336&tab=summary>

#### Education

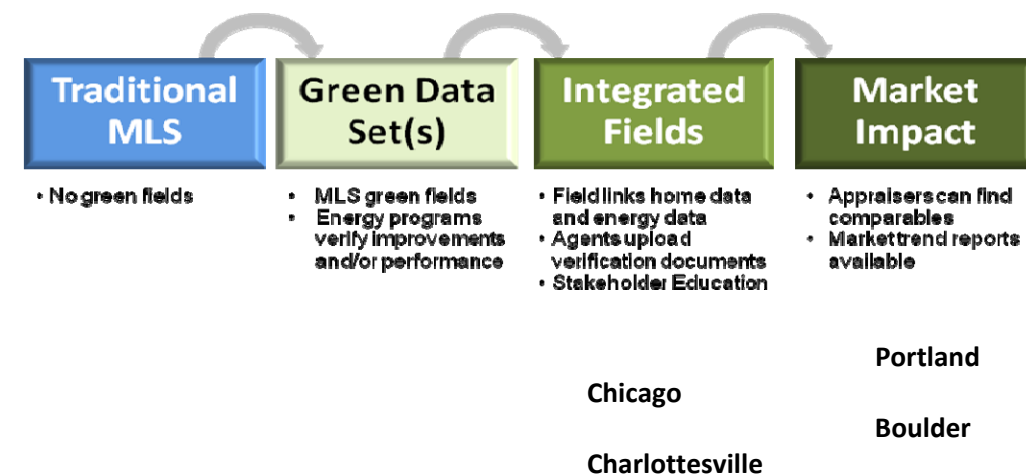
- NAR Green Resource Council started discussion to assign Laura Stukel as GreenMLS Toolkit Work Group Project Lead

## Progress Summary

Seven BBNP markets participated in the Roundtable. Coming into the Roundtable, the communities were at various stages across the GreenMLS Market Continuum:



Based on Roundtable, commitments to progress along the continuum are already underway.



### 3. Agenda Recap and Outcomes

#### Webinar - Wednesday, September 14th

**Desired Outcomes:**

- Build awareness of key concepts
- Highlight the credentials of the group attending the roundtable and encourage a team spirit
- Highlight the common concerns among varied stakeholders

**Results:**

- Achievement of outcomes as confirmed by questions asked
- Clear commitment and enthusiasm for the meeting as confirmed by number of attendees
- Clear engagement of participants as confirmed by quality and quantity of questions asked

Content	Activity	Results
Understanding GreenMLS Opportunities	Presentation	Common Awareness: <ul style="list-style-type: none"> <li>• Critical Success Factors for market-driving MLS</li> <li>• Continuum for advancing market-driving MLS</li> <li>• Multiple stakeholders must contribute</li> </ul>
Overview of Seven Better Buildings Neighborhood Programs	Summary of participant questionnaires (Better Buildings program and MLS)	Common Awareness: <ul style="list-style-type: none"> <li>• Assets for advancing market-driving MLS</li> <li>• Common challenges</li> </ul>
Considerations	Q&A	Themes: <ul style="list-style-type: none"> <li>• Managing stakeholders is difficult</li> <li>• No clear path for programs to quantify energy savings</li> <li>• Need more education of agents</li> <li>• Underwriters do not understand green and energy efficiency</li> </ul>

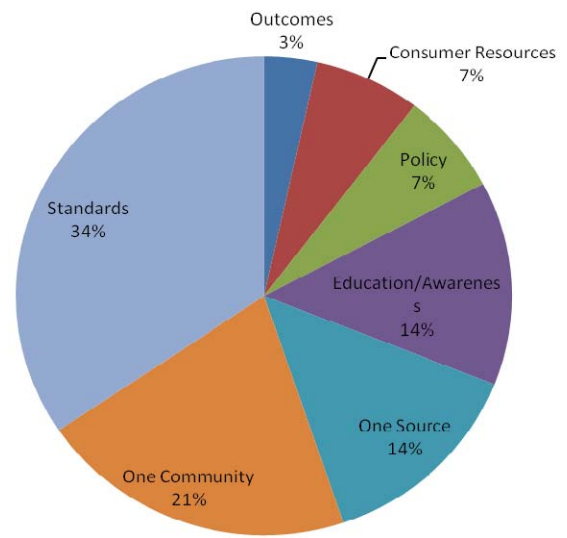
## Roundtable - Wednesday, September 28th

### Desired Outcomes:

- To significantly advance the practice of meaningful GreenMLS data that benefit the varied stakeholders who use it, with the goal of fairly reflecting value for energy efficient homes.
- Ultimately, to encourage the greening of MLS nationwide.

### Results:

- Commitments made to tools that will make minor improvements to data flow toward value
  - Commitment made to BPI Existing Home Certificate concept
  - Appraisal Institute Green & Energy Efficiency Addendum released
- Clear commitment to national and local progress based on engagement around a January progress webinar and LinkedIn site
  - More support needed around standards for valuation
  - More support needed around education
- Generated fresh ideas that could lead to more meaningful GreenMLS data if funded and developed



**What one thing would significantly advance GreenMLS?  
(individual responses)**

Content	Activity	Results
One thing that would significantly advance GreenMLS?	Ice Breaker question	<ul style="list-style-type: none"> <li>• Activity Outcome: We are fragmented, but we are a community of shared interests</li> <li>• Theme: We must share a long-term commitment to improve data flow</li> <li>• Highlights: (See chart.)                             <ul style="list-style-type: none"> <li>○ 55% of attendees view a long-term path toward progress</li> <li>○ Common attitudes around solutions:                                     <ul style="list-style-type: none"> <li>▪ 32% - Create standards to link performance and valuation</li> <li>▪ 22% - Work together as one community from contractor all the way to underwriter</li> <li>▪ 14% - We need one central source for reliable green history information</li> <li>▪ 14% - Improve education and awareness</li> </ul> </li> </ul> </li> </ul>

Content	Activity	Results
GreenMLS Toolkit “Value for Green Homes” Framework (from <a href="http://www.greenthemls.org">www.greenthemls.org</a> )	Presentation	<ul style="list-style-type: none"> <li>• Activity outcome: commitment to the vision for the path ahead</li> </ul>
Greatest needs for each stakeholder grouping to accomplish fair value at closing?	Discussion	<ul style="list-style-type: none"> <li>• Activity outcome: common understanding of Data Management Requirements</li> <li>• Theme: We need to work together to create better data across our shared system.</li> <li>• Highlights:               <ul style="list-style-type: none"> <li>○ Standard lexicon and glossary</li> <li>○ Data context                   <ul style="list-style-type: none"> <li>▪ Identify the major, viable certifications and ratings</li> </ul> </li> <li>○ Data standardization                   <ul style="list-style-type: none"> <li>▪ One-widely adopted data set</li> <li>▪ Core set of critical fields</li> <li>▪ Accepted by different users</li> <li>▪ Effective for different functions</li> </ul> </li> <li>○ Standard integrate third-party supporting documents with listings</li> </ul> </li> </ul>
Definitions: Certification, Verification, Label, Score	Discussion	<ul style="list-style-type: none"> <li>• Activity Outcome: preliminary discussion created some progress</li> <li>• Theme: We need a common lexicon.</li> <li>• Highlights:               <ul style="list-style-type: none"> <li>○ Verification is a process.                   <ul style="list-style-type: none"> <li>▪ A verb</li> <li>▪ Conducted by a third-party with professional credentials</li> <li>▪ Results in a distinctive, branded rating, score or label</li> <li>▪ Need accreditation for the training</li> </ul> </li> <li>○ Certification is a piece of paper.                   <ul style="list-style-type: none"> <li>▪ A noun</li> <li>▪ Produced during the verification process</li> <li>▪ Could be a rating, score or label for a level of achievement</li> </ul> </li> <li>○ Need context                   <ul style="list-style-type: none"> <li>▪ Not upgraded</li> <li>▪ Upgraded, but not to a standard</li> <li>▪ Level 1 – Built/remodeled to a standard, but not verified</li> <li>▪ Level 2 - Verified to minimum threshold</li> <li>▪ Level 3 – Verified to top threshold</li> <li>▪ Level 4 – Verified beyond top threshold</li> </ul> </li> </ul> </li> </ul>
Best Practices in GreenMLS Design	Demo IRES-NET (Boulder MLS)	<ul style="list-style-type: none"> <li>• Activity Outcome: Verification of “best practice” design that features restricted fields (document uploads required if green fields are selected)</li> <li>• Theme: Field verification supports valuation at closing</li> </ul>
As leaders, what is it going to take to move more properties towards fair value at closing?	Prioritization	Breakout Topics Selected: <ul style="list-style-type: none"> <li>• Data Requirements</li> <li>• Reporting Market Trends</li> <li>• Stakeholder/Consumer Engagement</li> <li>• Appraisal Integration</li> <li>• Finance Industry</li> </ul>

Content	Activity	Results
What needs to be developed and understood or better understood?	Breakouts by Topic	Themes: <ul style="list-style-type: none"> <li>• More data supports value– certifications/scores + utility bills + list of features</li> <li>• We are a community, dependent upon each other for common goal of value at closing</li> <li>• Strong need for centralized standardization and resource body to coordinate across the industries</li> <li>• Immediate opportunity for a work-around to fast-track impact: centralized database to collect green data and share with multiple users (mentioned by 4 out of 5 breakout groups)</li> </ul>
Our most important needs, strategies, tactics and resources to advance locally	Breakouts by Geography	Themes: <ul style="list-style-type: none"> <li>• Provide more stakeholder education</li> <li>• Commitments to improve local MLS design</li> <li>• Creative ideas to engage Realtors in improving home efficiency and value</li> </ul>
Next Steps/Wrap-Up	Agreement	<ul style="list-style-type: none"> <li>• Don't process notes – take action!</li> <li>✓ Meeting summary</li> <li>✓ LinkedIn Group (established 10/1, 21 members &amp; growing)</li> <li>• White Paper</li> <li>• January Progress Webinar – Updates from all 7 locations + DOE Home Energy Score + Appraisal Institute + National Home Performance Council</li> <li>• Conference Call with stakeholders involved in large data sets (NHPC, AI, etc.)</li> <li>• Outreach Plan: Lenders, Underwriters</li> </ul>

## Roundtable - Thursday September 29th

Content	Activity	Results
Observations	Discussion	<p>Themes:</p> <ul style="list-style-type: none"> <li>• Create a clear path for how to value green and energy efficiency improvements</li> <li>• Better Buildings Neighborhood programs are a great opportunity for MLS integration</li> <li>• Need a Roadmap for the big pieces                             <ul style="list-style-type: none"> <li>○ Finance (Note: This seems to align with BBNP Access to Capital)</li> <li>○ Valuation</li> <li>○ Education (Note: This seems to align with BBNP Access to Information)</li> </ul> </li> </ul>
Priority Focus Areas	Group Discussion	<p>Activity Outcome:</p> <ul style="list-style-type: none"> <li>• Valuation</li> <li>• Education</li> </ul>
Recap	Conference call with engaged stakeholders not able to attend	<p>Activity Outcome:</p> <ul style="list-style-type: none"> <li>• Engaged members of NAR's GreenMLS Toolkit team with Roundtable progress for future follow ups</li> </ul>
Commitments	Group Discussion	<p>Highlights:</p> <ul style="list-style-type: none"> <li>• Make local progress (January 2012, end of BBNP 2013)</li> <li>• Identify resources to further advance ideas</li> <li>• Networking site for sharing</li> </ul>

## 4. Attendees

### Better Buildings Grantees

Bedford, New York – Energize Bedford/Northern Westchester  
Boulder, Colorado – Energy Smart at Home  
California – Energy Upgrade California (Bay Area and SoCal)  
Charlottesville, Virginia – LEAP  
Chicago Region, Illinois – Energy Impact Illinois  
Portland, Oregon – Clean Energy Works Oregon

### National Organizations

- Department of Energy – Energy Efficiency & Renewable Energy (Washington, DC)
- EcoBroker International (Colorado)
- Energy Foundation (California)
- Adomatis Appraisal Service (Florida)
- National Association of Realtors, Green REsource Council (Illinois)
- Appraisal Institute (Washington, DC)
- Building Performance Institute (Washington, DC)
- Institute for Market Transformation (Washington, DC)
- National Home Performance Council (Washington, DC)
- PorterWorks (Washington)

### Local Organizations

#### *Bedford*

- Coldwell Banker/Rye
- Conservation Services Group
- Energize Northern Westchester
- Town of Bedford
- Westchester Putnam Association of REALTORS
- Zagaroli Appraisals & Realty Seminars

#### *Boulder*

- Colorado Landmark, REALTORS

- County of Boulder - Sustainability Program
- Elevations Credit Union
- Energy Smart at Home
- Information and Real Estate Services, LLC

*California*

- Build It Green
- Energy Upgrade California
- MLS Listings
- Southern Cal Realty
- Southland Regional Association of REALTORS

*Charlottesville*

- Better Homes & Gardens Real Estate III
- Charlottesville Area Association of REALTORS
- Local Energy Alliance Program

*Chicago Region*

- @Properties
- CNT Energy
- Chicago Metropolitan Agency for Planning
- Energy Impact Illinois
- LW Reedy Real Estate
- Midwest Real Estate Data Corporation

*Portland*

- Clean Energy Works of Oregon
- Regional Multiple Listing Service
- Watkins & Associates Appraisers
- Windermere Cronin & Caplan Realty Group

## 5. Next Steps

### 90 Day Plan

Theme	Activities	Status/Progress To Date
Prove It	<ul style="list-style-type: none"> <li>Identify success stories</li> <li>Define research opportunities</li> </ul>	In Process <ul style="list-style-type: none"> <li>Research project with NAR proposed                             <ul style="list-style-type: none"> <li>Identify target locations for research</li> </ul> </li> <li>Scope research opportunities</li> </ul>
Smooth It	<ul style="list-style-type: none"> <li>Identify opportunities to improve data sharing across industries</li> </ul>	In Process <ul style="list-style-type: none"> <li>Appraisal Institute Addendum &amp; rollout</li> <li>BPI Certificate &amp; rollout</li> <li>SAVE Act announcement on October 19<sup>th</sup></li> <li>Scope opportunities to improve data-sharing infrastructure</li> </ul>
Move It	<ul style="list-style-type: none"> <li>Define outreach and education opportunities</li> </ul>	In Process <ul style="list-style-type: none"> <li>NAR Green REsource Council working to assign Laura Stukel as GreenMLS Toolkit Project Lead</li> <li>Support immediate webinars</li> <li>Create Education roadmap</li> <li>Scope education opportunities</li> </ul>

### Other Next Steps

**1. Linked In site for knowledge sharing:**

[http://www.linkedin.com/groups?gid=4112229&trk=myg\\_ugrp\\_ovr](http://www.linkedin.com/groups?gid=4112229&trk=myg_ugrp_ovr)

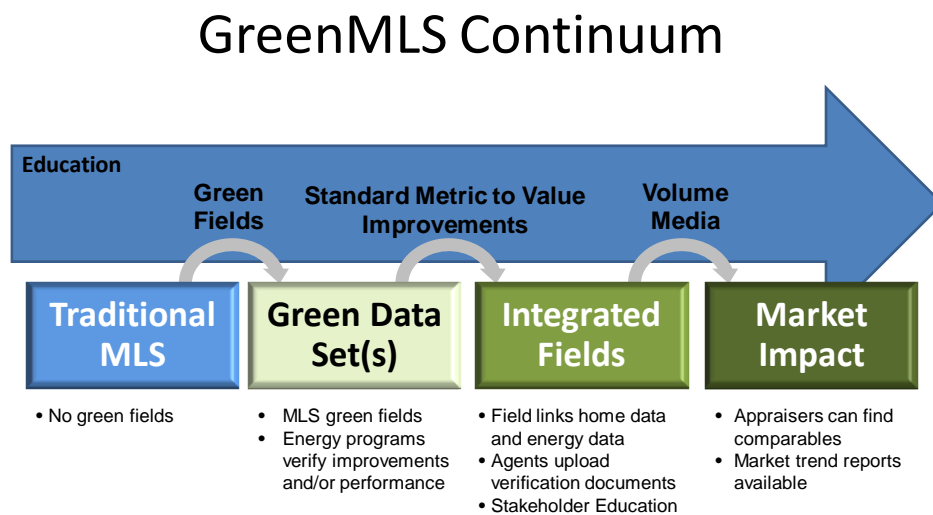
**2. January 2012 webinar – roundtable attendees to report on progress (date TBD)**

## 6. Recommendations

Items in this section will be further defined and scoped so priority suggestions can be implemented.

### 1. Support resources that will advance MLS strategically along the GreenMLS Continuum:

- Education
- Design best practices
- Metric to value improvements



### 2. Scope innovative new ideas that were created during the roundtable and seek funding to advance:

- “Housefax”
- “Seal of Approval” for GreenMLS design that is tied to receiving funding for training, research studies, etc.

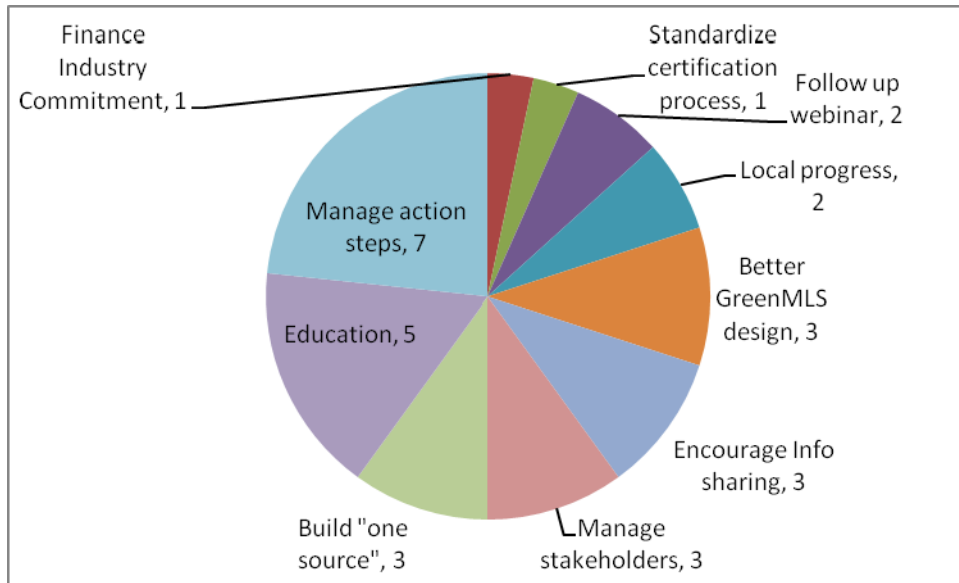
### 3. Support emerging assets that can advance MLS:

- GreenMLS Toolkit - GreentheMLS.org
- Appraisal Institute Green & Energy Efficient Addendum
- BPI Existing Home Certificate

## 7. Assessment & Performance

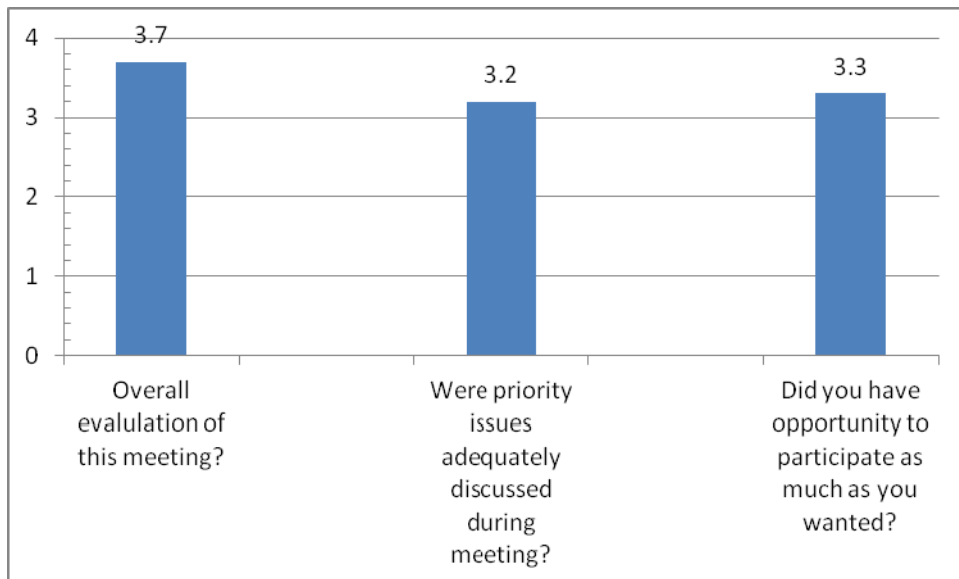
### Meeting Evaluation

Priority Focus Areas - Based on this meeting, what else needs to be done?



### Attendee Survey Results

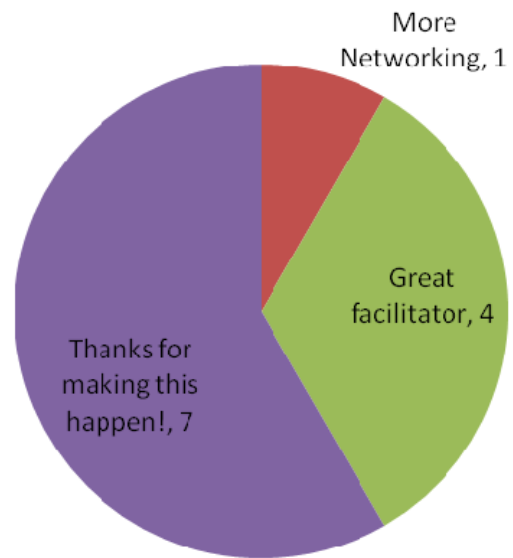
Meeting Evaluation (4 point scale)



How could we have improved this meeting?



Additional comments/suggestions



## Budget Performance

The event took place on-time and within budget. The budget supported the following outcomes:

- 43 organizations involved
- 35 attendees
  - 6 MLS operators
  - 4 appraisers
  - 6 Realtors
  - 6 BBNP representatives
- 25 attendees received travel funding

## 8. Conclusion

- Participants agreed that the roundtable was much-needed and the timing was excellent.
- Stakeholders were interdependent without realizing their own progress was connected to the success of the other stakeholders.
- Solutions are large and complex, but progress is possible with additional resources.
- Quick-win projects have been identified.
- Local partners are able to work together when face-to-face cooperation is facilitated.

# APPENDIX I:

## Summary of MLS Grant Work & Progress

Five of the seven metro areas represented at the Roundtable also coincidentally are MLS areas that have received third-party resources for GreenMLS projects. These areas are showing the most progress on GreenMLS best practices. Each area has received different types of funding and has a different design approach. Each area has benefited from a dedicated facilitator/project manager to keep efforts moving forward efficiently.

### State of Colorado

- Goal: Statewide GreenMLS field requirement
- Resources: Supported by Governor's Energy Office
- Outcomes:
  - Scans of third party certifications/ratings are a required upload for IRES in order to use fields
  - Training available at no cost to MLS that apply for grants

### State of New York (excluding New York City)

- Goal: Statewide GreenMLS field standard
- Resources: Funded by Doris Duke Charitable Foundation and staffed by Conservation Services Group
- Outcomes:
  - 12 MLS participating
  - Implementation plans in process, with live dates pending

### State of California

- Goal: Work one-on-one with interested MLS to advance use of green fields and offer training on local green programs to agents
- Resources: Funded by Energy Upgrade California and staffed by Build It Green
- Outcomes:
  - Training events underway
  - Realtor outreach underway
  - Valuation studies underway

### Chicago Metro

- Goal: Refine GreenMLS fields and begin requiring scans of third party certifications/ratings in order to use fields
- Resources: Staffed by CNT Energy
- Outcomes:
  - Local BetterBuildings Neighborhood Program energy scoring metric recommended as a searchable field
  - Pilot of third party scanned document requirement complete and full rollout recommended
  - Approved by Board of Governors on November 3. Implementation schedule pending.