



Specialized Stretch Energy Code

Public Educational Forum

March 1, 2023



Why We're Here

- Clean Energy Future Committee (CEFC) & Town Manager have introduced Warrant Article 10 to see if Town Meeting will vote to adopt the Specialized Stretch Energy Code, or Specialized Code
- Meeting Objectives:
 1. Review what the Specialized Code is and how it relates to Arlington's climate goals
 2. Highlight key components of the Specialized Code and how they would affect Arlington
 3. Provide an opportunity to ask questions of experts



Agenda

- Introduction
- Overview of Specialized Stretch Energy Code
- Key Provisions & Local Impacts
 - Large Homes
 - *Pause for questions*
 - Passive House & Multifamily Projects
 - Pre-wiring & On-Site Solar
- Open Question & Answer



Materials and resources will be available following the meeting

- We are recording the meeting
- Slides and recording will be available following the meeting, along with other resources, on the Clean Energy Future Committee website:
<https://www.arlingtonma.gov/town-governance/boards-and-committees/clean-energy-future-committee>



Zoom Protocols & Reminders



Comments and questions are welcome in the chat, but we will respond only during the designated Q&A times.

We may not be able to respond to all questions or comments during the meeting.



To ask a question during the designated Q&A times, either:

- 1) Raise your hand** using the Zoom Reactions button; OR
- 2) Type your question** into the chat.



Stay curious and be mindful.

Be kind to presenters, staff, and participants.

Please remain muted unless you have been called on to ask a question.





Introduction



HISTORY

2010

Town Meeting adopts
Stretch Code

Arlington receives
Green Communities
Designation; ~\$2M in
grants since 2010



2009

Stretch Code
created, provides
20-35% greater
efficiency over
Base Code



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2021

Arlington files home rule petition for clean heat bylaw
Select Board endorses Net Zero Action Plan
Act Creating Next Generation Roadmap for MA Climate Policy



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2022

Town Meeting passes Article 73 Resolution: A True Net Zero Opt-In Code for Cities & Towns

DOER completes Stretch Code updates, develops Specialized Code

Act Driving Clean Energy & Offshore Wind creates Fossil Fuel Free Demo Project



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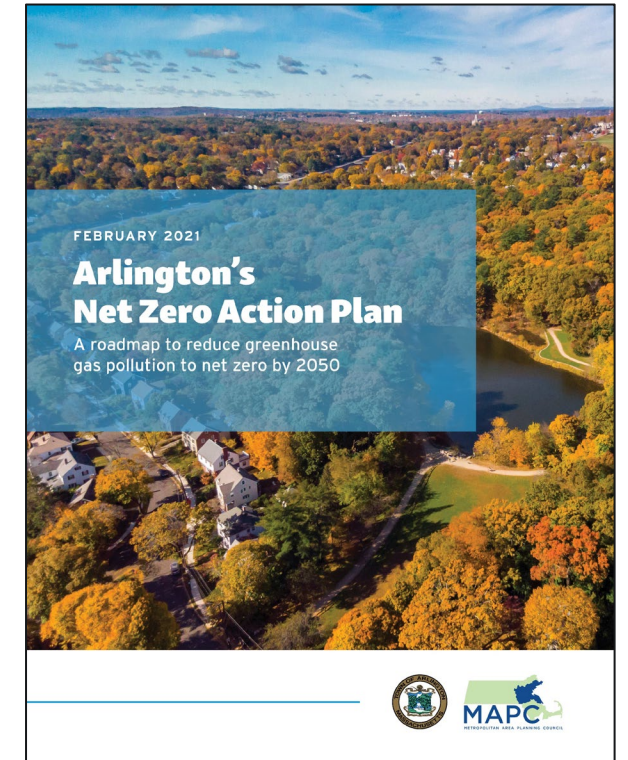
2023

Stretch Code Update takes effect for residential buildings
CEFC & Town Manager bring Article 10 to adopt Specialized Code to Town Meeting for vote



Net Zero Action Plan (NZAP) Priority

- Roadmap to net zero greenhouse gas (GHG) emissions by 2050
- Key strategy is electrification of buildings and vehicles to facilitate clean energy transition
- Priority measure: “Advocate...for a state net zero energy stretch code” (what eventually became the Specialized Stretch Code)
- Metric of success is Town adoption of Specialized Stretch Code



Specialized Code & Fossil Fuel Free Demonstration Project

- MA legislature has not approved clean heat Home Rule Petitions; instead, it created a **10-municipality Fossil Fuel Free Demonstration Project** through 2022 Act Driving Clean Energy & Offshore Wind
- DOER draft regulation and model rule suggest that **adoption of the Specialized Code may be a key step for participation in Fossil Fuel Free Demonstration Project**

<https://www.mass.gov/info-details/municipal-fossil-fuel-free-building-demonstration-program>



Potential Specialized Stretch Code Timeline in Arlington

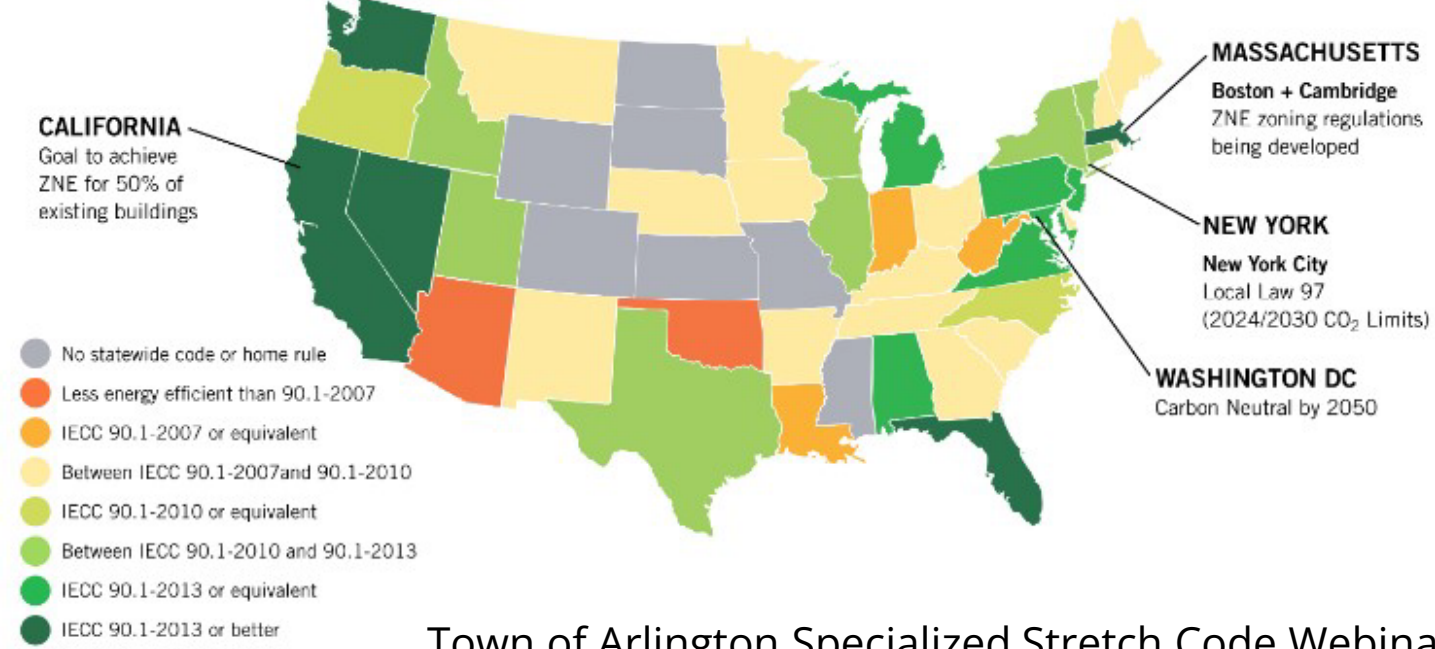
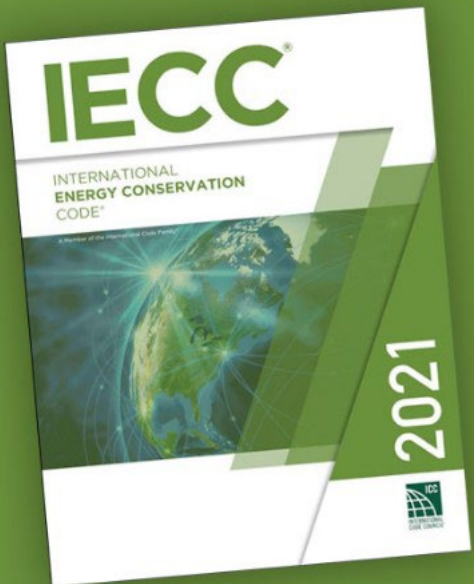




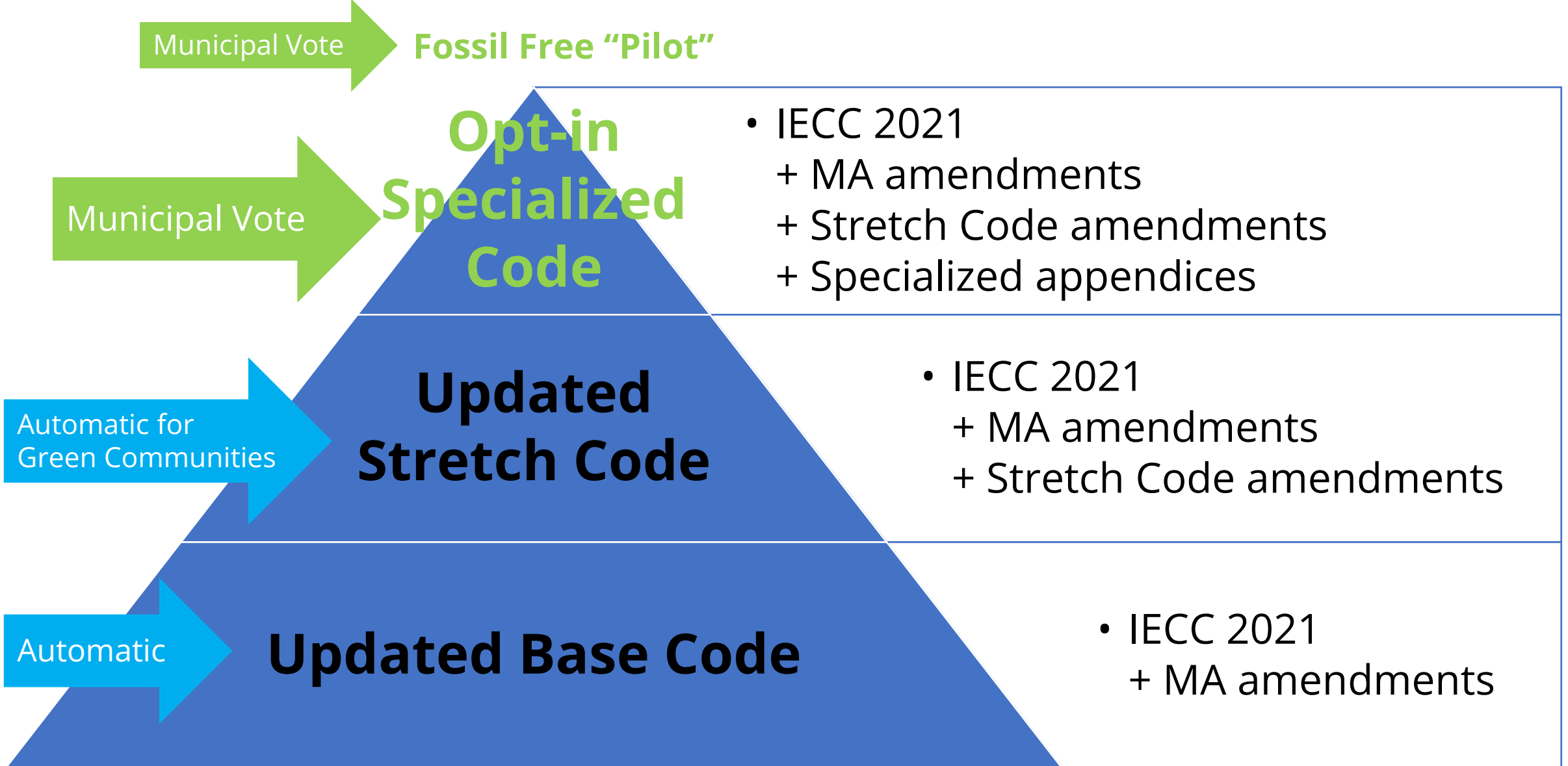
Overview of Specialized Stretch Energy Code



What are building codes?



MA “overlay” building energy codes “build successively”



MA emissions reduction limits per Global Warming Solutions Act (2008)

↓ 50%

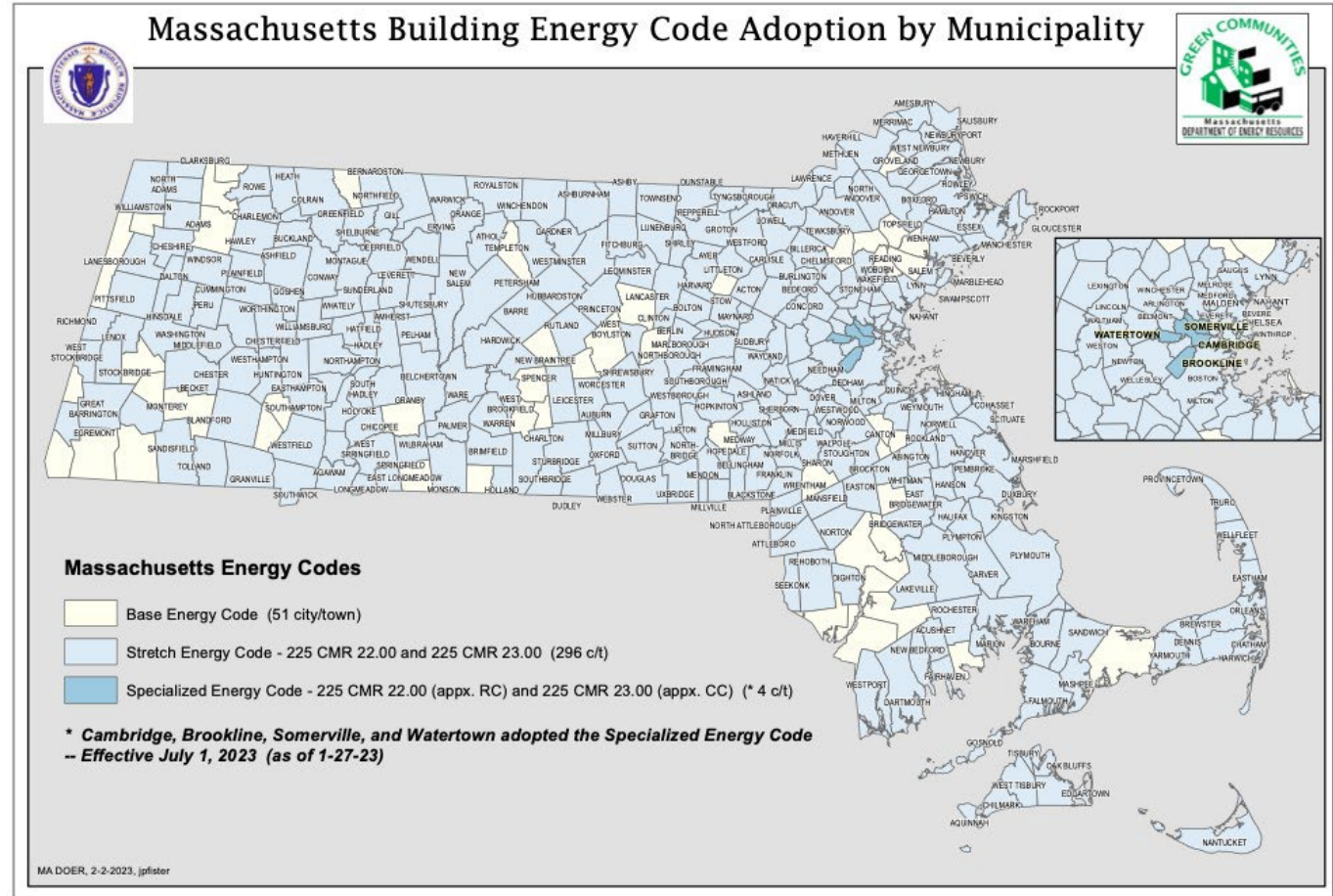
Reduction by 2030
(compared to 1990 levels)

↓ 75%

Reduction by 2040
(compared to 1990 levels)

↓ 0

Net GHG Emissions
by 2050



Opt-In Specialized Code Summary

1 Pre-Wiring

Buildings using fossil fuels must pre-wire for future electrification.

2 Solar PV

Buildings using fossil fuels must install a certain amount of rooftop solar PV.

3 Exemplary Performance for Large Homes

If using fossil fuels, single-family homes > 4,000 SF must be certified Zero Energy (HERS 0 or Plus ZERO).

4 Exemplary Performance for Large Multi-Family

Multi-Family buildings >12,000 SF must use the Passive House pathway.

5 Jump on Lower HERS Ratings

Lower HERS ratings of 42/45 upon effective date of adoption (instead of July 1, 2024).

RESIDENTIAL Updated Stretch vs Municipal Opt-In Specialized Code

Comparison of updated Stretch and Municipal Opt-in Specialized Energy Codes for New Low-rise Residential Buildings¹

Building Size	Fuel Type	Minimum Efficiency		Electrification		Minimum EV Wiring	Renewable Generation	
		<i>Stretch Code</i>	<i>Specialized Opt-in Code</i>	<i>Stretch Code</i>	<i>Specialized Opt-in Code</i>		<i>Stretch Code</i>	<i>Specialized Opt-in Code</i>
Dwelling units up to 4,000 sf	All-electric	HERS 45 ² or Passive House pathways	HERS 45 or Passive House pathways	Full	Full	1 parking space	Optional	Optional
Dwelling units up to 4,000 sf	Mixed-fuels	HERS 42 ² or Passive House pathways	HERS 42 or Passive House pathways	Optional	Pre-wiring required	1 parking space	Optional	Solar PV: ≥4 kW for single family and ≥0.75 W/sf for multi-family (except shaded sites and Passive House certified buildings)
Dwelling units >4,000 sf	All-electric	HERS 45 ² or Passive House pathways	HERS 45 or Passive House pathways	Full	Full	1 parking space	Optional	Optional
Dwelling units >4,000 sf	Mixed-fuels	HERS 42 ² or Passive House pathways	HERS 0 or Phius ZERO	Optional	Pre-wiring required	1 parking space	Optional	Solar PV or other renewables to meet the Zero energy building definition

COMMERCIAL Updated Stretch vs Municipal Opt-In Specialized Code

Comparison of updated Stretch and Municipal Opt-in Specialized Energy Codes for New Commercial Buildings¹

Building Type	Fuel Type	Minimum Efficiency Pathway		Electrification		Minimum EV Wiring	Renewable Generation	
		Stretch Code	Specialized Opt-in Code	Stretch Code	Specialized Opt-in Code		Stretch Code	Specialized Opt-in Code
Offices and Schools >20,000 sf	All Electric	Thermal Energy Demand Intensity (TEDI) or Passive House pathways	Thermal Energy Demand Intensity (TEDI) or Passive House pathways	Full	Full	20% of parking spaces for residential and business uses, 10% for other uses	Optional	Optional
Offices and Schools >20,000 sf	Mixed-fuels	TEDI or Passive House pathways	TEDI or Passive House pathways	Optional ⁵	Pre-wiring required	20% of parking spaces for residential and business uses, 10% for other uses	Optional	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area
High Ventilation (Hospitals, Labs, etc.)	All Electric	TEDI, 10% better than 2019 ASHRAE Appendix G, or Passive House pathways	TEDI, 10% better than 2019 ASHRAE Appendix G, or Passive House pathways	Full	Full	20% of parking spaces for residential and business uses, 10% for other uses	Optional	Optional
High Ventilation (Hospitals, Labs, etc.)	Mixed-fuels	TEDI, 10% better than 2019 ASHRAE Appendix G ⁴ , or Passive House pathways	TEDI, 10% better than 2019 ASHRAE Appendix G ⁴ , or Passive House pathways	Optional ^{4,5}	Pre-wiring required	20% of parking spaces for residential and business uses, 10% for other uses	Optional	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area
Multi-family >12,000 sf	All Electric	TEDI, HERS 45 ² , Passive House pathways, or (until July 1, 2024) 10% better than ASHRAE Appendix G	Passive House pathways or HERS 0 ³	Full	Full	20% of parking spaces	Optional	Optional
Multi-family >12,000 sf	Mixed-fuels	TEDI, HERS 42 ² , Passive House pathways, or (until July 1, 2024) 10% better than ASHRAE Appendix G	Passive House pathways or HERS 0 ³	Optional ⁵	Pre-wiring required	20% of parking spaces	Optional	Optional with Passive House
Small Commercial (<20,000 sf, except multi-family)	All Electric	Prescriptive pathway plus Stretch Code amendments	Prescriptive pathway plus Stretch Code amendments	Full	Full	20% of parking spaces for residential and business uses, 10% for other uses	Optional	Optional
Small Commercial (<20,000 sf, except multi-family)	Mixed-fuels	Prescriptive pathway plus Stretch Code amendments	Prescriptive pathway plus Stretch Code amendments	Optional ⁵	Pre-wiring required	20% of parking spaces for residential and business uses, 10% for other uses	Optional	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area



Key Provisions & Local Impacts

Large Homes





Houses Large and Small

Low Rise Residential: 3 Paths to Compliance

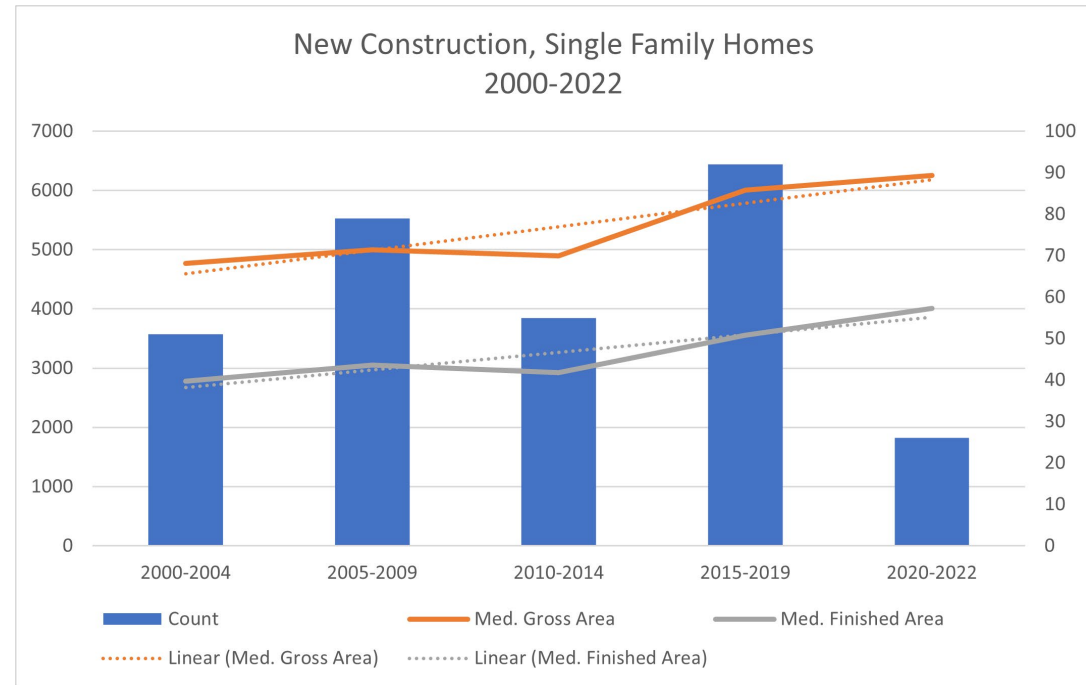
- All-Electric: HERS 45 or Passive House. **DOER anticipates this will be the most used compliance pathway.**
- Mixed-Fuel:
 - HERS 42 + Electric Ready + On-Site Solar Where Feasible
 - OR
 - Passive House + Electric Ready
- Zero Energy
 - HERS 0 (HERS 42+ On-Site Renewable to Completely Offset both Electric & Fossil Fuel Usage.)
 - OR
 - Passive House (Plus Zero) (Plus Core Standard + Offsetting Renewables (which may be onsite or offsite))
- **Homes over 4,000 conditioned square feet (csf) must be all-electric or zero energy! Mixed-Fuel Pathway Not Allowed.**

The provision on large houses will have a significant impact in Arlington.

- The requirement that homes > 4,000 sf must either be all electric or a zero-energy building will apply to many if not most new single-family houses constructed in Arlington.
- The code defines “all-electric” rigorously to include HVAC, service hot water, & appliances (including stoves). It does not include things like emergency generators.
- The standards for showing a Zero Energy building are also strict.
 - Precertification of Compliance with PHIUS ZERO performance standard.
 - Achieve HERS Zero, which requires meeting the HERS score required by the updated Stretch Code and then making up gap to zero by solar or another form of on-site generation.
- **BOTTOM LINE: BIG HOUSES IN ARLINGTON WILL BE (MORE) CLIMATE FRIENDLY**

New Houses in Arlington Are Big & Getting Bigger

- By finished square footage, median size of new (single-family) construction is now about 4,000 sf.
- Median house size has been steadily increasing for two decades.



Data from 2022* Show 50% All-Electric Homes and about 70% of single-family homes exceeding 4,000 csf.

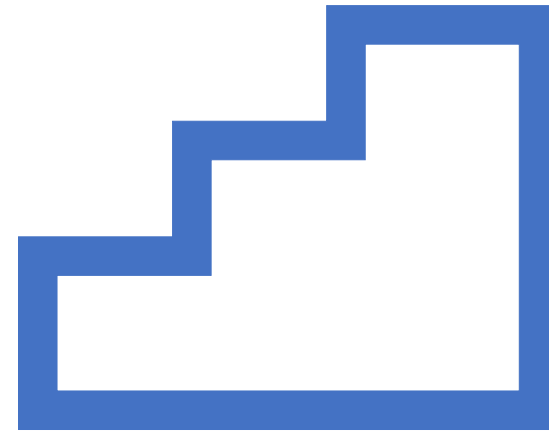
- 24 new dwelling units (single family and duplex) were built in Arlington in 2022.
- 12 of these were new, all-electric homes (2 had HERS < 45)
- 12 were new mixed-fuel homes (2 had HERS < 42)
- 7 of these units were more than 4,000 conditioned sf.
- None of these were Passive House homes.

*Data from Town of Arlington Inspectional Services Department

The Large House Rule: A First Step

- Under the Specialized Code, Large houses (>4,000 csf) must either electrify or go net zero energy. This is a powerful incentive to electrify.
- The rule will apply to more and more houses as house size increases.
- The next step would be to apply the same rule to smaller houses.
- Over time, this could lead to nearly universal electrification of new low-density housing construction.
- This, however, is for

ANOTHER DAY





Pause for Questions





Key Provisions & Local Impacts **Passive House & Multifamily** **Projects**



The Specialized Code requires that new, multifamily buildings over 12,000 SF be designed to the Passive House Standard

- In Arlington, 1-2 new buildings over 12,000 SF are constructed per year, on average*

*Data from building permits pulled Jan 2018 through March 2023



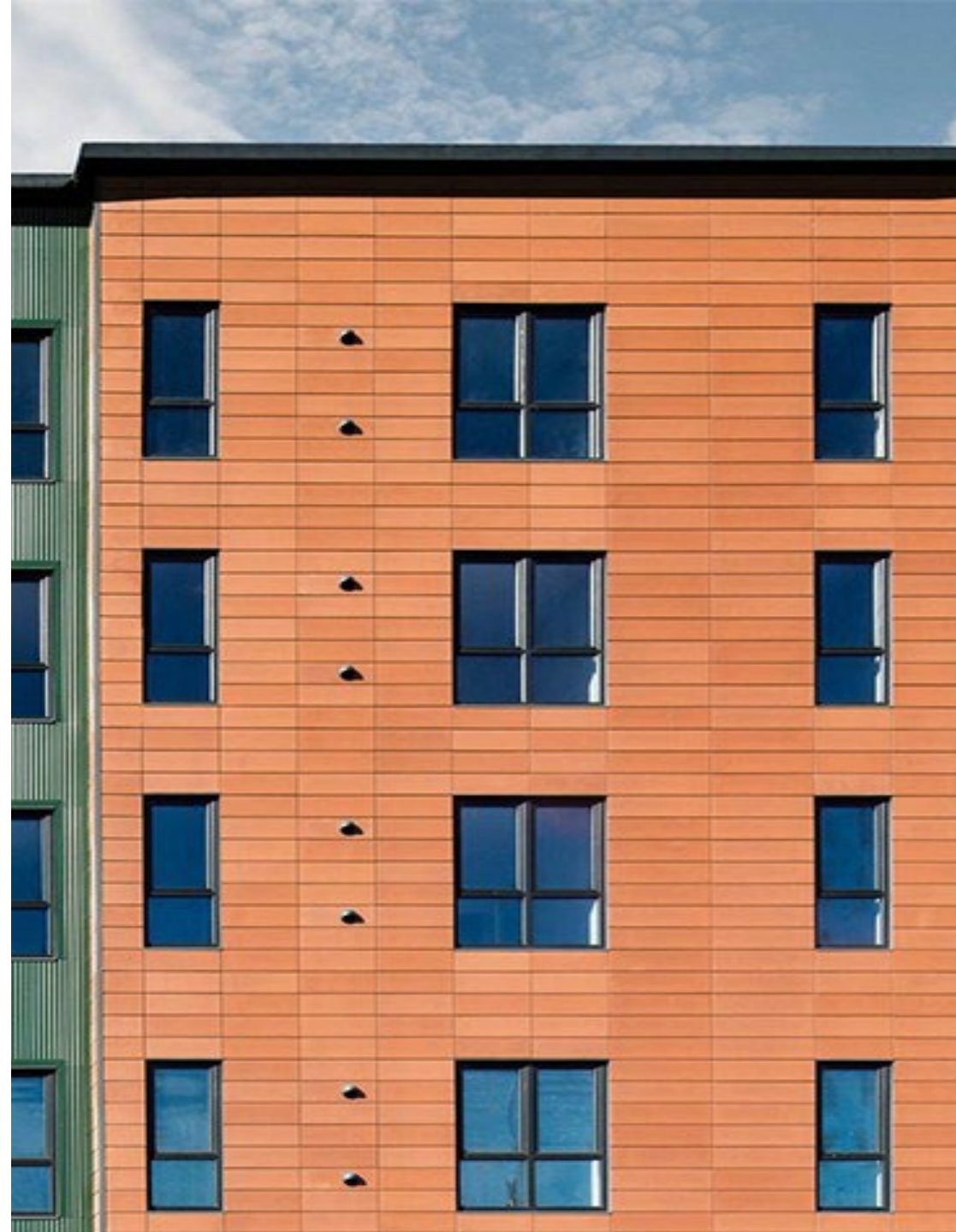
PASSIVE HOUSE Building Standard

Aaron Gunderson
Exec. Director, PHMass
www.PHMass.org
Aaron@PassiveHouseMA.org
Twitter @PassiveHouseMA



Passive House is a **performance-based** building standard that focuses on the dramatic **reduction of energy use**, while ensuring a comfortable, healthy, and low-carbon building.

A Passive House can be **any building type** – home, office, school, etc. and any size.



Benefits of Passive House

Financial Benefits

- Reduced energy costs
- Reduced maintenance costs
- Climate resilient construction

Health & Comfort Benefits

- Improved indoor air quality
- Consistent temperature
- Quieter acoustics

Environmental Benefits

- Reduced carbon emissions
- Climate resilient building
- Focus on embodied carbon



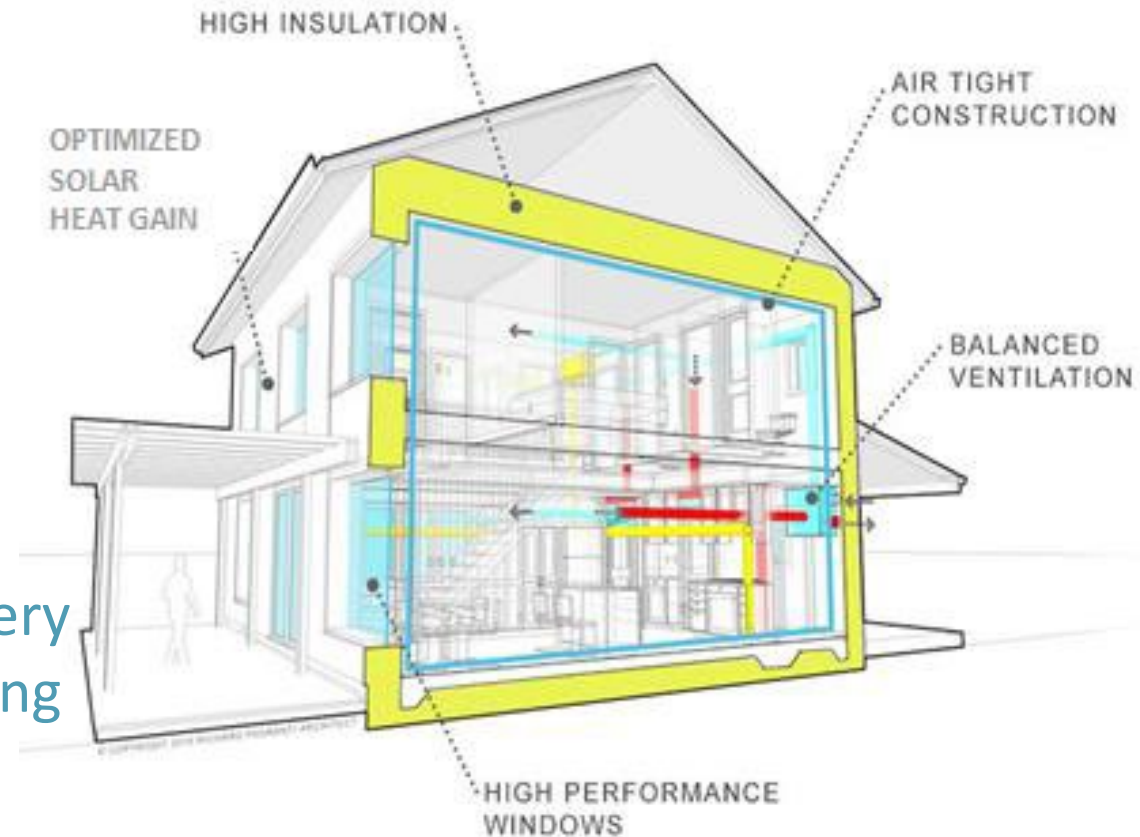
Features of Passive House Buildings

Building Envelope:

- Exterior Thermal Insulation
- Continuous Air-Barrier
- Thermal Bridge Mitigation
- High-Performance Windows & Doors
- Optimized Solar Heat Gain

Mechanical Systems:

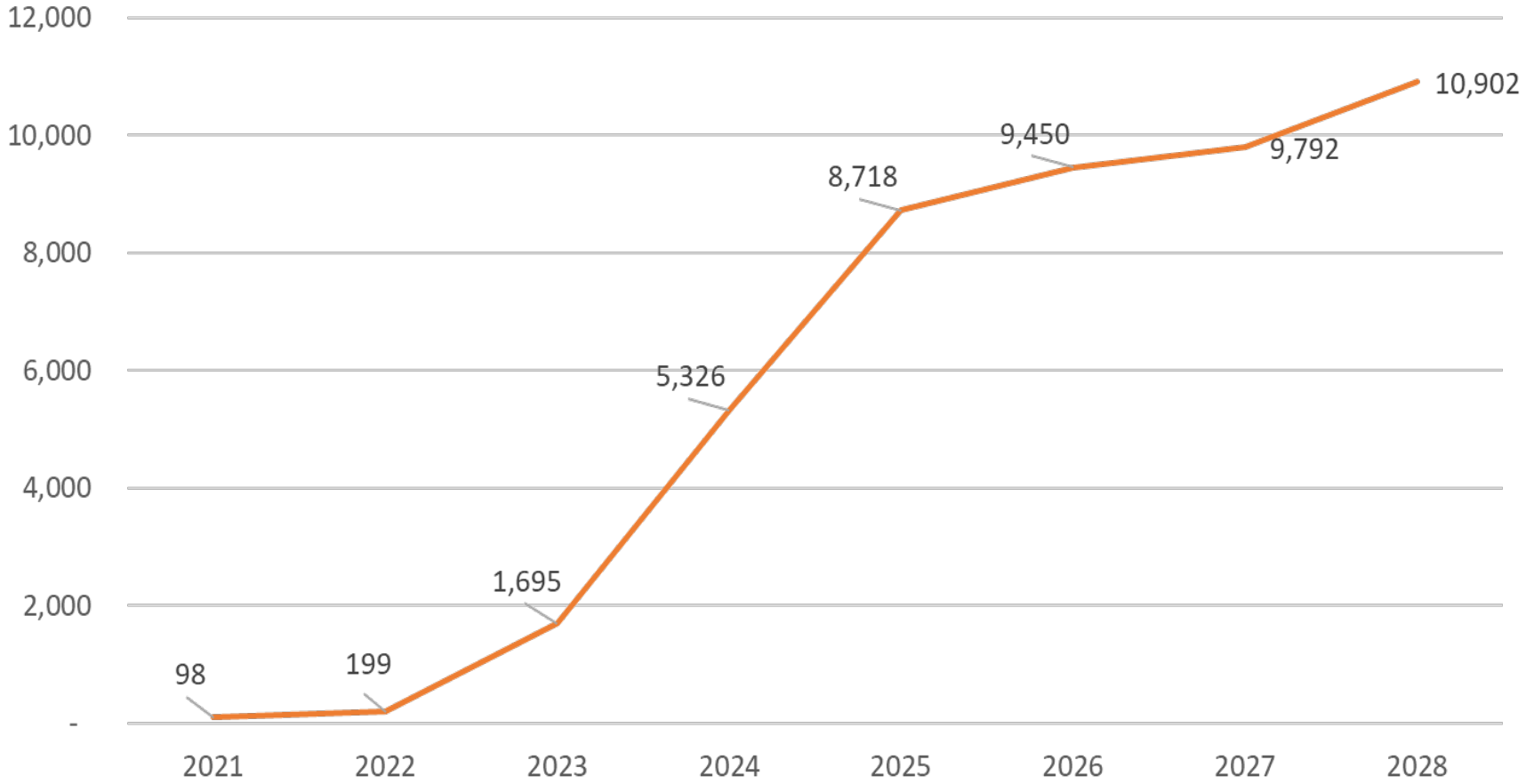
- Balanced Ventilation with Heat Recovery
- Efficient and Minimized Heating/Cooling
- Efficient Water Heater



Passive House Multifamily is Scaling



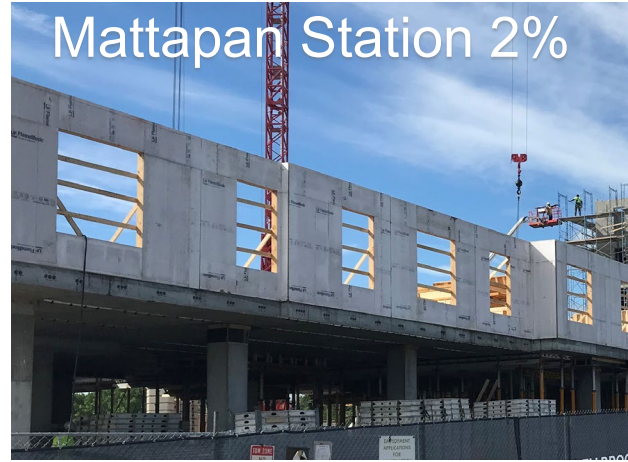
Enrolled Projects - Unit Counts



— # Units Cumulative
WE ARE MASS SAVE®:



Incremental Costs are Low for Multifamily Projects



Mass Save Passive House Incentives are Available

- Multi-Family buildings with 5+ units
- Certification through PHI or PHIUS



Passive House Incentive Structure for Multi-Family (5 units or more)			
Incentive Timing	Activity	Incentive Amount	Max. Incentive
Pre-Construction	Feasibility Study	Up to 100% of Feasibility costs	\$5,000
	Energy Modeling	75% of Energy Model cost	\$500/unit, max. \$20,000
	Pre-Certification	\$500/unit	N/A
Post-Construction	Certification	\$2,500/unit	
	Net Performance Bonus	\$0.75/kWh \$7.50/therm	

The Net Performance Bonus is calculated by determining the final pay for savings incentives and subtracting the pre- and final certification incentives. The result is the Net Performance Bonus.

Projects that pre-certify but do not achieve certification are eligible for the pre-certification incentive and Net Performance Bonus.

Projects over 100 units must be pre-approved by the applicable Sponsors of Mass Save.

Training Opportunities

Mass Save All-Electric Homes & Passive House Training Program

Lunch and Learns

Target Audience: Architects, builders, contractors, designers, developers, engineers, financing agencies, and municipal officials

For developers and general contracting firms that need a high-level introduction to Passive House standards, development costs, project delivery, and more

These 1–2 hour events are presented at no cost to participants and is Continuing Education Unit (CEU)-eligible for Passive House credentials

Building Science Workshops

Target Audience: Architects, builders, developers, engineers, estimators, general contractors, project teams, and sub-contractors

Covering building science best practices, quality assurance, and more

These half-day training events are presented at no cost to participants and is Continuing Education Unit (CEU)-eligible for Passive House credentials

Passive House Accreditations

Target Audience: Passive House builders, consultants, designers, raters, tradespeople, and verifiers

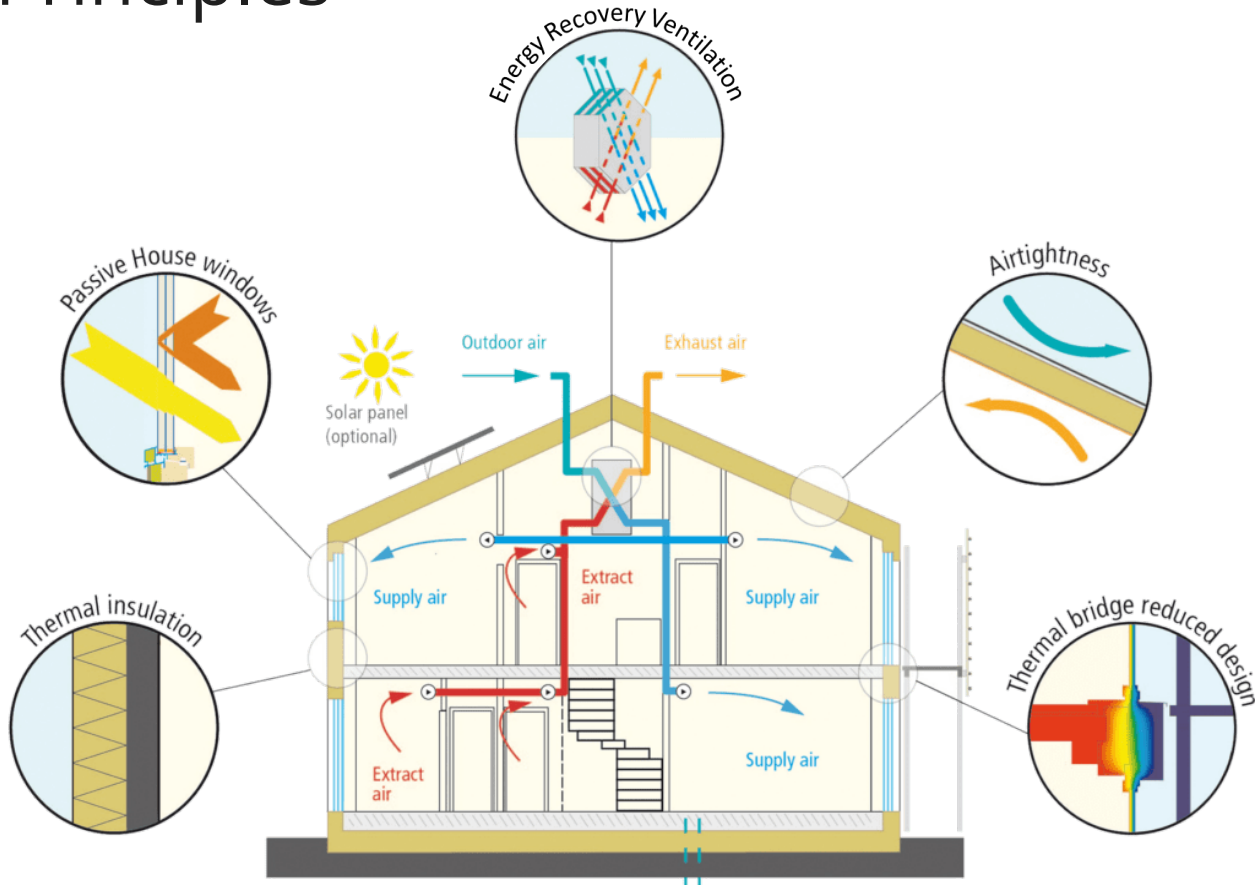
Offer 50% cost reimbursement to participants upon successful completion of certification.

Requires submission of [reimbursement application](#).

Training time varies based on the training course selected; limit two participants per company per training course.

Passive House

Principles



Benefits

Health and Comfort:

- Superior thermal comfort
- Exceptional indoor air quality
- Better sound isolation
- Resilience during loss of power

Operations and Maintenance:

- Lower operational costs
- Right-sized MEP systems
- Quality assurance and durability

Soft benefits:

- Improved marketability (and competitiveness in affordable QAP process)
- Simplified stretch energy code compliance
- Access to incentives

Passive House at Utile



152-158 Broadway
Somerville, MA | 45 Units
PHIUS Pre-certified, In Construction



Front St.
Portland, ME | 100 Units
PHIUS Pre-certified, In Construction



3371 Washington St.
Boston, MA | 39 Units
In Design, PHIUS-Registered



1200 Montello
Brockton, MA | 94 Units
In Design, PHIUS-Registered



25 Sixth St.
Chelsea, MA | 62 Units
PHIUS Pre-certified



1599 Columbus Ave.
Boston, MA | 65 Units
PHIUS Pre-certified



Walnut St. Housing
Foxborough, MA | 282 Units
PHIUS Pre-certified



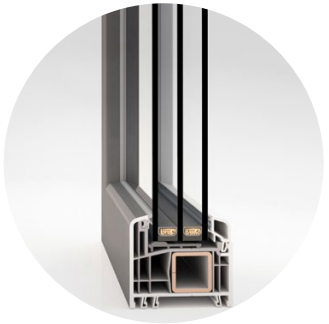
1005 Broadway
Chelsea, MA | 38 Units
PHIUS Pre-certified, In Construction

3371 Washington Street, Boston



Airtight Envelope

Continuous air control layer at all transitions



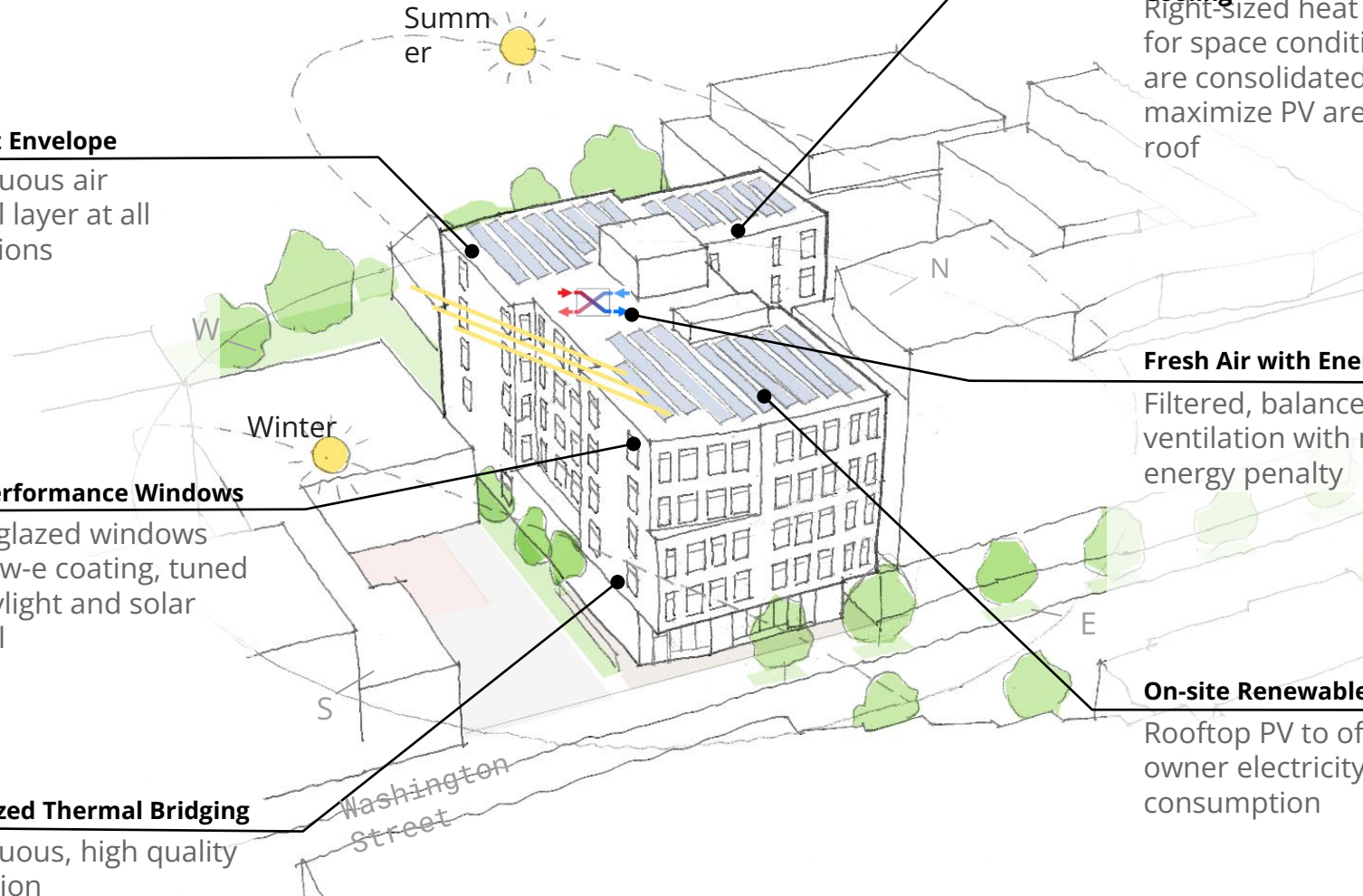
High-Performance Windows

Triple-glazed windows with low-e coating, tuned for daylight and solar control



Minimized Thermal Bridging

Continuous, high quality insulation with thermally broken assemblies



Right-sized Heating + Cooling

Right-sized heat pumps for space conditioning are consolidated to maximize PV area on roof



Fresh Air with Energy Recovery

Filtered, balanced ventilation with minimal energy penalty

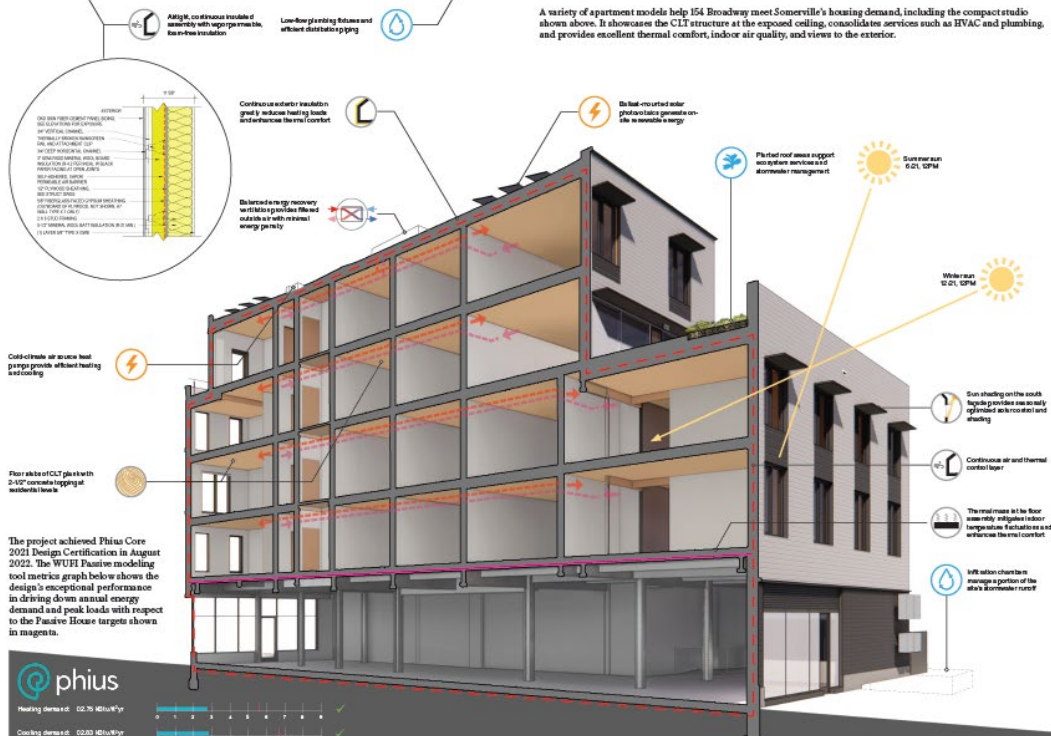
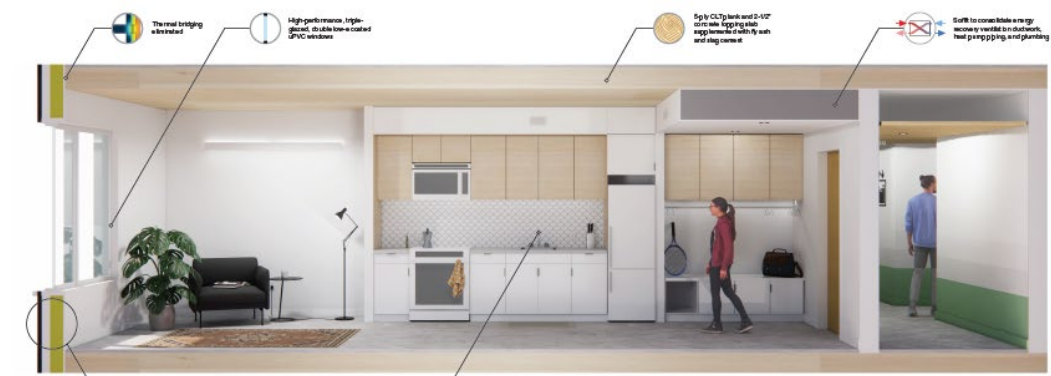


On-site Renewables

Rooftop PV to offset owner electricity consumption



154 Broadway, Somerville



A variety of apartment models help 154 Broadway meet Somerville's housing demand, including the compact studio shown above. It showcases the CLT structure at the exposed ceiling, consolidates services such as HVAC and plumbing, and provides excellent thermal comfort, indoor air quality, and views to the exterior.

The project achieved Phius Core 2021 Design Certification in August 2022. The WUFI Passive modeling tool metrics graph below shows the design's exceptional performance in driving down annual energy demand and peak loads with respect to the Passive House targets shown in red.





Passive House in Arlington: Housing Corporation of Arlington





Key Provisions & Local Impacts **Pre-wiring & On-Site Solar**



Pre-wiring and solar requirements

- Required for projects following the **mixed-fuel*** pathway, i.e., that will use fossil fuels
- **Solar:** Helps offset impacts of fossil fuel use
- **Pre-wiring:** Facilitates / lowers cost of future electrification (“an ounce of prevention...”)
- Maximizing solar energy and building electrification are two **key strategies for meeting Arlington’s 2050 net zero goal**

* “Mixed-fuel” means any use of fossil fuels for space heating, water heating, or other appliances.



Solar requirements by building type WITH MIXED FUEL

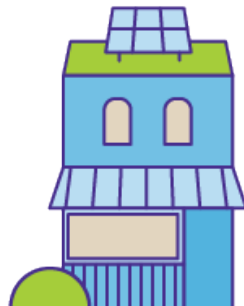
Building Type (WITH MIXED FUEL)		Solar Requirement	Notes
Low-rise Residential (≤3 stories)	Dwelling units <4,000 sf	≥4kW for single family ≥0.75W/sf for multifamily	Exemptions: Shaded sites (viable areas shaded >70% daylight hours); Passive House certified, buildings where the Potential Solar Zone Area is <300 sf
	Dwelling units >4,000 sf	Solar PV or other renewables sufficient for zero energy	
Multifamily	Buildings >12,000 sf	N/A – optional*	Must pursue Passive House
Commercial	Small commercial, offices / schools, high ventilation	≥1.5W/sf for each sq foot of 3 largest floors <u>or</u> 75% of Potential Solar Zone Area	Excludes multifamily buildings*

*except projects undergoing Environmental Design Review which, per Arlington's Zoning Bylaw, must install solar on at least 50% of the roof area



“Potential Solar Zone Area”

- Flat and/or low-sloped roofs oriented 90-300° of true north (south/southwest) where annual solar access is $\geq 70\%$
- Shading from obstructions on the roof or other parts of the building not included in determining solar access



Pre-wiring is required for all mixed-fuel projects

- What does pre-wiring mean...
 - Sufficient capacity for future electricity use - load calculations must assume future electrification
 - Dedicated circuits and plugs installed near fossil fuel equipment for future installation of electric equipment
- 200-amp service likely sufficient (depends on load)





Questions



Frequently Asked Questions

1 Does the Opt-In Specialized Code apply to existing structures?

No. Improvements to existing structures, depending on size, are regulated by the Updated Stretch Code and Base Code.

2 Will the Opt-In-Specialized Code discourage the creation of affordable housing?

No. Incentives will continue to encourage affordable housing while the Opt-In Specialized Code delivers benefits for residents.

3 Is it possible to install a gas cooktop?

Yes. This is permitted under the Mixed Fuel pathways.

4 Why adopt the Opt-In Specialized Code?

The #1 reason is that it requires pre-wiring, avoiding costly retrofits down the road and expediting electrification.

5 Why does the Opt-In Specialized Code permit fossil fuels?

It preserves market choice at a time when utility pricing is highly volatile and utility costs vary 300% among MA communities. “Net zero” definitions vary widely.

Resources

NEEP FAQ & Comparative Tables

<https://neep.org/ma-updated-stretch-code-municipal-opt-specialized-code-faq>

<https://neep.org/resources>

BSA Critical Stretch Code Series

<https://www.architects.org/events/558258/2023/01/20/doer-critical-stretch-code-series>

DOER Summary Documents

<https://www.mass.gov/doc/summary-document-explaining-stretch-energy-code-and-specialized-opt-in-code-language/download>

Community Presentations

<https://www.wellesley.ma.gov/317/Advisory-Committee>

Hit PLAY at 1:29



Comparison Chart

	UPDATED STRETCH CODE		MUNICIPAL OPT-IN STRETCH CODE	
RESIDENTIAL LOW-RISE				
R406.5 Maximum Energy Rating Index (HERS Index) ¹	Fossil Fuel	HERS 42	<4000 sf - Mixed Fuel*	HERS 42
	Solar		<4000 sf - All-Electric	HERS 45
	All-Electric	HERS 45	>4000 sf - Mixed Fuel*	HERS 0
	Solar & All-Electric		>4000 sf - All-Electric	HERS 45
R405 - Passive House Building Certification Pathway ²	Passive House	PHIUS CORE, PHIUS ZERO, or PHI	All Building Sizes	PHIUS CORE, PHIUS ZERO, or PHI
R403.6.1 Mechanical Ventilation ²	ERV/HRV for Ventilation		ERV/HRV for Ventilation	
R404.4 - EV Ready Parking Spaces ²	1 EV Ready Space		1 EV Ready Space	
EXISTING BUILDINGS				
R503.1.5 Alterations ¹	Fossil Fuel	HERS 52	Fossil Fuel	HERS 52
	Solar	HERS 55	Solar	HERS 55
	All-Electric		All-Electric	
	Solar & All-Electric	HERS 58	Solar & All-Electric	HERS 58
MULTI-FAMILY				
R406 Maximum Energy Rating Index (HERS Index) ¹	Fossil Fuel	HERS 42	None	
	Solar			
	All-Electric	HERS 45		
	Solar & All-Electric			
R405 - Passive House Building Certification Pathway ²	Passive House	PHIUS CORE, PHIUS ZERO, or PHI	>12,000 sf Mixed Fuel	PHIUS CORE or PHI
R403.6.1 Mechanical Ventilation ²	ERV/HRV for Ventilation		ERV/HRV for Ventilation	
R404.4 - EV Ready Parking Spaces ²	20% of Spaces EV Ready		20% of Spaces EV Ready	

1. Impacts buildings permitted on or after July 1, 2024 for Updated Stretch Code
 2. Impacts buildings permitted on or after January 1, 2023 for Updated Stretch Code
 * Municipal Opt-In Stretch Code requirements only take effect after adoption, with a recommended 6 month waiting period

