



**Form 371P  
Clean Energy Works Portland – Pilot Contractor Participation  
Application**



**Oregon Home Performance with ENERGY STAR® Program—  
Pilot Phase III**

**Home Energy Solutions—Existing Homes**

*Conservation Services Group (CSG) is a Program Management Contractor for Energy Trust of Oregon, Inc.*

projects will not be revolving as in prior phases; more jobs will be assigned to contractors selected for the Pilot whose successful application scores are highest.

The group of homeowners selected for this phase will be drawn from applicants who have already applied, and potential homeowners who have already expressed interest through the Energy Trust of Oregon website

Additionally, as ARRA regulations are finalized and workforce data from Phase II and Phase III becomes available, additional Participating Contractor requirements may be imposed during and after Phase III. Participating Contractors will be notified of any such changes. After Phase III, a review of the Pilot structure and objectives, including Participating Contractor obligations and requirements, will be undertaken. It is anticipated that as a result of this review, a new solicitation for future phases or the Pilot scale up participating contractors will be issued. Preference for experienced Participating Contractors is anticipated for contractors selected for the scale up phase in order to demonstrate an ability to implement the scale up quickly and efficiently.

**Weighted Selection Factors**

Eligible contractors who apply for participation in the Pilot will be selected by a selection committee comprised of the Energy Trust, CSG, City of Portland, and SEIC representatives, and selection will be based on an analysis and weighting of many performance and workforce factors. Additionally, assignments for assessments and retrofit jobs during Phase III will be based on final application scoring. More jobs will be assigned to Participating Contractors whose Phase III application scores are the highest. The scoring and weighting of these factors is identified as follows:

Max Available Points		
7		<b>1. Demonstrated experience in the Home Performance with Energy Star program</b>
3	<b>a.</b>	0-20 Home Performance jobs
4	<b>b.</b>	21-40 Home Performance jobs
5	<b>c.</b>	41-60 Home Performance jobs
6	<b>d.</b>	61-80 Home Performance jobs
7	<b>e.</b>	80+ Home Performance jobs
7		<b>2. Quality control compliance in Home Performance installation work-QC Pass Rate Percentage 1/1/08 - 8/31/09</b>
1	<b>a.</b>	41-60%
6	<b>b.</b>	61-80%
7	<b>c.</b>	81-100%
7		<b>3. Record of exceptional customer service.</b>
4	<b>a.</b>	Provide customer letter of recognized exceptional service and invoice from project completed in the last 12 months (multiple letters do not receive additional points)
1-3	<b>b.</b>	Provide list of 10 most recently completed residential projects (and their homeowner contact info). Cannot include the customer letter above. Three of the ten will be contacted and asked to rate your customer service based on a scale of: 1-poor, 2-acceptable, 3-exceptional. The average will be used.

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- 7            **4. Successful track record in hiring and retaining historically disadvantaged or underrepresented people**, including people of color and women.
  - 1            **a.**    5-20% of your direct-hire field staff consists of women, African American, Hispanic, Asian Pacific, Pacific Islander, American Indian, or Alaskan Native
  - 4            **b.**    21-50% of your direct-hire field staff consists of women, African American, Hispanic, Asian Pacific, Pacific Islander, American Indian, or Alaskan Native
  - 5            **c.**    51-75% of your direct-hire field staff consists of women, African American, Hispanic, Asian Pacific, Pacific Islander, American Indian, or Alaskan Native
  - 7            **d.**    76+% of your direct-hire field staff consists of women, African American, Hispanic, Asian Pacific, Pacific Islander, American Indian, or Alaskan Native

1-3           Below 20%, contractors can receive credit for this factor by providing a detailed and readily implementable plan (250 word **max**) for how they will hire, maintain, and welcome diversity in their workforce in the immediate future. Narrative will be scored by the applicant review team: 1-poor, 2-acceptable, 3-exceptional. The average will be used.
  
- 7            1-7       **5. Submission of a well described and readily implementable plan (250 word max) for establishing “Mentor-sub” relationship with businesses owned by historically disadvantaged or underrepresented people** including people of color- and women-owned businesses that have been in business for a minimum of 6 months. A “mentor-sub relationship” means a commitment to working with a subcontractor for a significant amount of Pilot-related work while such sub-contractor seeks necessary training and experience toward BPI certification to be eligible to be considered for selection in subsequent Pilot participating contractor pools. There are more points available for naming multiple subcontractors. Narrative will be scored by the applicant review team: 1-poor, 3-acceptable, 4-exceptional, with one point for additional subs. The average will be used.
  
- 5            **6. Demonstrated history of subcontracting with Disadvantaged Business Enterprise (DBE) or Minority Business Enterprise/Women Business Enterprise (MBE/WBE).**
  - 4            **a.**    Contractor has subcontracted with Certified DBE, MBE, or WBE in the last 6 months
  - 5            **b.**    Contractor is a Certified DBE, MBE, or WBE
  - 3            **c.**    If neither of above apply, contractor may submit a well described and readily implementable plan (250 word **max**) on developing sub-contracting relationships for Pilot work with Disadvantaged Business Enterprise (DBE) or Minority Business Enterprise/Women Business Enterprise (MBE/WBE) who have been in business for a minimum of 6 months. Narrative will be scored by the applicant review team: 1-poor, 2-acceptable, 3-exceptional. The average will be used.
  
- 7            **7. Description of a demonstrable track record of hiring from registered apprenticeship and other credential-granting programs, or providing employment opportunities to graduates of pre-apprenticeship training programs who are seeking self-sufficient career pathways in weatherization and construction.**
  - 1            **a.**    5-20% of your direct-hire field staff consists of former participants in registered training or credential- granting apprentice or pre-apprentice programs
  - 4            **b.**    21-50% of your direct-hire field staff consists of former participants in registered training or credential- granting apprentice or pre-apprentice programs

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- 5            c.    51-75% of your direct-hire field staff consists of former participants in registered training or credential- granting apprentice or pre-apprentice programs
- 7            d.    76+% of your direct-hire field staff consists of former participants in registered training or credential- granting apprentice or pre-apprentice programs
- 1-3            If below 20%, contractors can receive credit for this factor by providing a detailed and readily implementable plan (250 word **max**) for how they will hire former participants in registered training or credential- granting apprentice or pre-apprentice programs. Narrative will be scored by the applicant review team: 1-poor, 2-acceptable, 3-exceptional. The average will be used.
  
- 4            4    **8.** Hire record of at least 80% of employees residing in the Portland metro region
  
- 7            **9.** Provision of health insurance to employees
  - 2            a.    Partial employee premium coverage
  - 4            b.    Full employee premium coverage
  - 6            c.    Full employee premium coverage with partial dependent premium coverage
  - 7            d.    Full employee premium coverage with full dependent premium coverage
  
- 3            3    **10.** Oregon-based contractors
  
- 2            **11.** Demonstrate efforts to strive to provide employment opportunities to formerly incarcerated individuals who are seeking self-sufficient career pathways in weatherization and construction. Contractors can receive credit for this factor by providing a detailed and readily implementable plan (250 word max) for how they will provide employment opportunities to formerly incarcerated individuals who are seeking self-sufficient career pathways in weatherization and construction. Narrative will be scored by the applicant review team: 0-poor, 1-acceptable, 2-exceptional. The average will be used.

**Role of Energy Advocate**

Instrumental to the success of this Pilot is the cooperation between the selected Participating Contractors and the Energy Advocate. The Energy Advocate role is one of facilitating the process of bringing energy savings through this Pilot within the limits of the financing terms and criteria. As the facilitator, the Energy Advocate will not act exclusively on behalf of the participating homeowner or the Participating Contractor, but rather an advocate for the Pilot and the Pilot’s objectives. The nature of the position may require variations, but the following list represents the general role and responsibilities.

- Manages multiple processes within the Pilot ensuring projects are completed on time, on budget and according to Energy Trust of Oregon Home Performance quality standards.
- Works with Participating Contractors and homeowners to coordinate the testing of homes selected for the pilot program.

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- Ensures the quality of Home performance testing by requiring Participating Contractor to follow all health and safety guidelines and regulations required by current BPI standards and Energy Trust weatherization specification guidelines.
- Collects and analyzes data gathered during contractor-performed Home Performance “test in” and inputs data into Home Check software to determine potential cost effective measures that could be installed into the home.
- Works to establish scope and costs that consider both homeowner expectations concerning project cost, time, and scope, as well as contractor expectation on performance of scope and budget.
- Assists in the gathering, processing, and directing of all documents required of the participants in this pilot.
- Facilitates the signing of proposed bid and prepares documents to be presented to designated project lender.
- Collects and analyzes data gathered during contractor-performed Home Performance “test out” and inputs data into Home Check software to determine effective energy savings after installation of work has been performed.

### Participating Pilot Contractor Application

This Participating Pilot Contractor Application (the “Application”) is the application to become a Clean Energy Works Portland Pilot Participating Contractor for Phase III. Please complete this Application by reading the terms and conditions contained in this **Form 371P** and then signing. **Return your signed Application to Energy Trust at the address below not later than 5:00 PM, Pacific Time, January 22, 2010.**

Upon final review of a completed Application, Energy Trust, in its sole discretion, will determine whether to accept or reject the Application. Applicants will be notified of the decision in writing, and only upon receipt of a Clean Energy Works Portland Pilot Participating Contractor **Approval Notice**, will the applicant be a Participating Contractor and eligible to participate in the pilot for this phase

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**Applicant Information**

Company Name
Contact Name
BPI Certification and ID Number <i>(Required for participation)</i>

**Terms and Conditions for Participation**

- Incorporation by Reference. In addition to the Terms and Conditions for Participation set forth in this **Participation Application (Phase III) (Form 371P)**, all terms and conditions set forth in the **Trade Ally Initial Application (Form 1171A)**, **Trade Ally Network Addendum (Form 371A)**, and the **Participation Agreement Oregon Home Performance with ENERGY STAR (Form 371E)**, including, but not limited to all definitions and operating procedures as set forth in Attachment B to **Form 371E**, are part of this Application and hereby incorporated by reference.
- Information Meetings. Participating Contractor agrees to attend a mandatory Clean Energy Works Portland Pilot kick-off and training meeting at a date to be set between January 29th and February 12th, 2010. Participating Pilot Contractor further agrees to attend regular update and status meetings to be scheduled not more frequently than bi-weekly during this Clean Energy Works Portland Pilot Phase.
- Workflow Process. Participating Contractor acknowledges accepts, and agrees to comply with the Portland Clean Energy Works workflow process as set forth in **Exhibit A** to this Application. Participating Contractor further agrees and accepts that during the Portland Clean Energy Works Phase III period, Energy Trust may change the workflow process with notice to Participating Contractor and Pilot Contractor agrees to adopt any such revised workflow process
- Pilot Assignments. Participating Contractor acknowledges and agrees that more jobs under the Pilot will be assigned by the Pilot Project Coordinator to Participating Contractors whose successful Phase III application scores were highest.
- Service Standard. Participating Contractors will exercise a high level of customer service and cooperate and collaborate closely with the Energy Advocate on each job and job site assigned.
- Pilot Acceptable Measures.  
Participating Contractor acknowledges and agrees that the following measures represent the only energy efficiency measures eligible for processing through the Pilot.
  - Basic Weatherization – air sealing, duct sealing, duct insulation, and attic insulation
  - Extended Weatherization – air sealing, duct sealing, duct insulation, attic insulation, wall insulation, and floor insulation
  - Space Heating – heat pump or high-efficiency gas furnace
  - Water Heating – high-efficiency electric water heater, or tankless gas water heater

*Note: Participating Contractors may install additional measures outside of the Clean Energy Works Portland Pilot packages, but incentives for such additional measures would be paid in accordance with Energy Trust's regular programs.*
- Pilot Site Assessment and Test-in Procedures. Participating Contractor agrees to provide open slots Monday thru Thursday, to allow for scheduling by the Project Coordinator of Home Performance with ENERGY STAR assessments at assigned home job sites. The Participating Contractor agrees to perform a Home Performance with ENERGY STAR

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assessment at the assigned job site during the assigned time slot scheduled by the Project Coordinator. All such assessments will include a “test-in” using HomeCheck software. Participating Contractor acknowledges and agrees that the HomeCheck “test-in” will be overseen by the Energy Advocate.

8. Compensation for Home Performance with ENERGY STAR Diagnostic Assessments. Participating Contractor agrees that compensation for their portion of Home Performance with ENERGY STAR Diagnostic Assessments (test-in and test-out) in the Clean Energy Works Portland Pilot, including presentation of all required reports to homeowners, will be a flat fee of \$300 per home.
9. Pilot Wage Requirements. Participating Contractor agrees that it will pay hourly wages, and it will ensure that its subcontractors pay hourly wages, for all work undertaken as part of the Pilot in an amount not less than 180% of Oregon state minimum wage, unless the particular federal prevailing wage hourly rate, as set forth on **Exhibit B** to this Application for the types of work performed is higher, in which case the Participating Contractor agrees to pay, and will ensure that its subcontractors pay, the higher federal prevailing wage.
10. Designated Training Program Hiring. Participating contractors agree to hire 100% of new worker/installer weatherization employees from a Clean-Energy-Works-Portland-Pilot-designated training program until 50% of contractor’s total non-supervisory worker/installer weatherization employee monthly work hours on covered projects are performed by graduates of a CEWP-designated training program. Participating contractors will ensure that their sub-contractors also hire 100% of new worker/installer weatherization employees from a Clean-Energy-Works-Portland-Pilot-designated training program until 50% of the sub-contractor’s total non-supervisory worker/installer weatherization employee monthly work hours on covered projects are performed by graduates of a CEWP-designated training program. Current Clean Energy Works – Portland Pilot designated training program listing are attached hereto on **Exhibit C**.

This provision is waived if all graduates of designated training programs are currently employed in weatherization work or have waived their priority employment status; if the contractor can demonstrate that no suitable graduates of designated training programs are available; or if no CEWP Pilot-designated training program has the capacity and ability to train experienced new hires to USDOE standards within a reasonable time and at reasonable cost, as determined by the SEIC.

11. Designated Safety Training Program. Participating contractors will utilize a safety-trained workforce in which all on-site workers have completed an OSHA 10-hour safety course and an Environmental Hazard Awareness Course through CEWP Pilot-designated qualified training program.

*(NOTE: As of 1/8/10 no qualified safety training program has been designated as a CEWP Pilot program. This provision is waived for this round of the pilot program.)*

12. Labor Peace Agreement. Participating Contractor agrees to the labor peace provisions as set forth in **Exhibit D** and on the Signature and Representations Box below.
13. Reporting Requirements. During the Clean Energy Works Portland Pilot Phase III period, Participating Contractor agrees to report monthly, not later than the 15<sup>th</sup> of each month following the end of the month in which data is available for reporting in forms provided by the Pilot, on the following issues:
  - a. Demographic information regarding workforce, including workforce information for all subcontractor workforce.
  - b. Healthcare insurance coverage for Participating Contractor employees and employees of any of their subcontractors.
  - c. Participating Contractor acknowledges and agrees that all reporting required under this term will be made available to members of the public and Clean Energy Works Portland Pilot participating homeowners, upon request.
14. Cultural Competency Training. Participating contractor will have completed or commit to complete a CEWP-approved cultural competency and inclusive and harassment-free workplace training within three months of submitting being accepted as a participating contractor.

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*(NOTE: As of 1/8/10 no cultural competency and inclusive and harassment-free workplace training has been designated as CEWP approved. This provision is waived for this round of the pilot program.)*

15. Wage and Hour Law Compliance. Participating Contractor represents and warrants that it has a satisfactory history of compliance with federal and state wage and hour laws and, further, is not listed by Oregon's Commissioner of the Bureau of Labor and Industries under ORS 279C.860 as ineligible to receive a contract or subcontract for public works.
16. WorkSource Oregon Listing. During the Clean Energy Works Portland Pilot period, Participating Contractor agrees to list any job openings related to Clean Energy Works Portland through WorkSource Oregon when there is a need for an external hire; provided, however, Participating Contractors are not required to fill any such vacancies through WorkSource Oregon nor does this requirement apply to any pre-negotiated hiring agreements.

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17. Bid Criteria. The Participating Pilot Contractor is required to provide to the Energy Advocate a bid proposal for the measures identified by the Home Performance with ENERGY STAR Assessment and allowed in this Clean Energy Works Portland Pilot Phase. Before submitting this bid proposal, the Contractor is to have performed a review in Home Check to ensure that the projected annual energy savings meet the following minimum thresholds for each of the packages: Basic Weatherization = 10% savings, Extended Weatherization = 20% savings, Extended Weatherization with Hot Water = 20% savings, Extended Weatherization with Electric Heat Pump or Gas Furnace = 30% savings. In addition to meeting the minimum annual saving thresholds, bids for the proposed packages must come in below the following price caps: Basic Weatherization (electric) Cap = \$4,300, Basic Weatherization (gas) Cap = \$4,300, Extended Weatherization (electric) Cap = \$8,800, Extended Weatherization (gas) Cap = \$8,800, Extended Weatherization with Electric Hot Water Cap = \$9,600, Extended Weatherization with Gas Hot Water Cap = \$12,300, Extended Weatherization with Electric Heat Pump Cap = \$18,300, Extended Weatherization with Gas Furnace Cap = \$14,100, Extended Weatherization with Electric Heat Pump and Electric Hot Water Cap = \$19,850, Extended Weatherization with Gas Furnace and Gas Hot Water Cap = \$18,300.

<b>CEWP Pilot Phase III Maximum E2 Package Cost and Minimum Energy Savings</b>		
Fuel Source: Electric		
Energy Efficiency Improvement Package	Maximum Package Cost	Minimum Energy Savings (HomeCheck)
Basic Weatherization	\$ 4,300	10%
+ Hot Water	\$ 5,500	10%
+ Heat	\$ 14,150	20%
+ Hot Water and Heat	\$ 15,700	20%
Extended Weatherization	\$ 8,800	20%
+ Hot Water	\$ 9,600	20%
+ Heat	\$ 18,300	30%
+ Hot Water and Heat	\$ 19,850	30%
Fuel Source: Gas		
Energy Efficiency Improvement Package	Maximum Package Cost	Minimum Energy Savings (HomeCheck)
Basic Weatherization	\$ 4,300	10%
+ Hot Water	\$ 8,150	10%
+ Heat	\$ 9,950	20%
+ Hot Water and Heat	\$ 14,200	20%
Extended Weatherization	\$ 8,800	20%
+ Hot Water	\$ 12,300	20%
+ Heat	\$ 14,100	30%
+ Hot Water and Heat	\$ 18,300	30%

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The Energy Advocate will review the energy savings and price cap compliant bid proposal for accuracy, and if no further action or clarification is needed the Energy Advocate will present the proposal to the homeowner, along with the Contractor, if Contractor so chooses. The Participating Pilot Contractor agrees to enter into an agreement with the homeowner to install the measure package if accepted by the homeowner. Participating Pilot Contractor agrees that should the proposed bid package not meet the energy savings or price cap thresholds it may not be presented to the homeowner, and the next Participating Pilot Contractor in the queue may be invited to provide a bid. Participating Pilot Contractor agrees that should the proposed bid package meet the thresholds, but not be acceptable to the homeowner, the next Participating Pilot Contractor in the queue may be invited to provide a bid. If after two bids have been provided for any individual home, and the energy savings or price cap thresholds cannot be reached, or the homeowner does not accept a threshold compliant bid, the Program will remove the home from the Pilot Phase and review separately.

18. Job Completion Timelines. Participating Pilot Contractor agrees to complete all installations of measure packages for jobs assigned through the Clean Energy Works Portland Pilot within thirty (30) calendar days of signed loan documents unless additional time is authorized in writing by the Energy Advocate.
19. Test-Out Procedure and Inspection. Upon completion of a job assigned under the Clean Energy Works Portland Pilot, the Participating Pilot Contractor agrees to perform a "test-out" with HomeCheck software, along with an Energy Advocate. Participating Pilot Contractor acknowledges and agrees that the "test-out" process will be overseen by the Energy Advocate. Participating Pilot Contractor further agrees and acknowledges that the Energy Advocate will inspect each and every job assigned under the Portland Clean Energy Fund Pilot to determine that payment can be made and will notify the homeowner and SBEC of the inspection results. Inspection failures must be corrected in accordance with Energy Trust's Home Energy Solutions Quality Control Disciplinary Policies and Procedures prior to Contractor payment disbursement.
20. Payment. Subject to approval by SBEC of all necessary financing documentation, SBEC will disburse payment to Participating Pilot Contractors for jobs completed in accordance with the terms of the Clean Energy Works Portland Pilot after SBEC receives notice from the Energy Advocate that a job has been completed and approved for payment.
21. Termination. In addition to and not in place of any other termination provisions in any other agreements between Energy Trust, CSG, and Participating Pilot Contractor, Participating Pilot Contractor acknowledges and agrees that Energy Trust may suspend and/or end Participating Pilot Contractor's eligibility for assignments under the Clean Energy Works Portland Pilot at any time for revisions to Clean Energy Works Portland Pilot, for violation of any of these Terms and Conditions for Participation, or for any other reason in its sole discretion. Participating Pilot Contractor will be promptly notified in writing of such suspension or termination.
22. Further Assurances and Additional Requirements. Participating Pilot Contractor agrees to abide by any additional requirements, specifications, and quality control requirements for the Clean Energy Works Portland Pilot as set forth in information provided to Participating Pilot Contractor during this phase.

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**Signature and Representation Box**

By signing this application, I represent that (i) I am duly authorized to submit this Application on behalf of the Participating Pilot Contractor Applicant; (ii) the information provided in this Application and any other documents submitted to Energy Trust relating to trade ally status is and continues to be true, accurate and complete; (iii) I have read this Application in its entirety; (iv) I understand, and accept the terms and conditions contained in this Application; (v) I adhere to the labor peace provisions as set forth on **Exhibit D** hereto; and (vi) I understand and accept that all such terms and conditions continue to apply and control upon my approval as a Participating Contractor. I further understand and accept that approval or rejection of this Application is in the sole discretion of Energy Trust and that only upon receipt of any **Clean Energy Works Portland Pilot Participating Pilot Contractor Approval Notice** will Applicant be a Participating Pilot Contractor.

NOTE: Trade and/or Customer References May Be Requested in Connection with this Application

Name of Company	Authorized Representative (printed name)	Title
Signature	Date	

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**EXHIBIT A**

## CEWP Pilot Phase III Process

### **Application and Pre-Screening**

1. CSG receives applicant information via CEWP website
2. CSG reviews applicants for energy savings potential by assessing use relative to Portland average
3. SBEC verifies ratepayer history and assigns pre-approval rating

### **Initial Contact and HP Assessment**

4. CSG Project Coordinator completes the data intake sheet with participant answers from online application.
5. CSG Project Coordinator calls pre-approved participant; asks additional qualifying questions, informs participant about pilot details, time commitment and financing process.
  - a. Homeowner may self disqualify if already participating with other weatherization assistance
  - b. Homeowner may need to consider up front costs of addressing items outside of the pilot's weatherization scope (i.e. knob & tube)
  - c. If homeowner still eligible, they are scheduled for an assessment (to occur within 10 business days based on the homeowner's availability) with whichever contractor and EA schedule slot is available
6. CSG Project Coordinator sends the homeowner application to contractor and EA with online app answers and additional answers from phone call screening.
7. HP Assessment conducted; EA, contractor and homeowner are all present
  - a. EA responsible for bringing and getting signed: Homeowner Application, Homeowner Participation Agreement (372P), HomeCheck data collection sheet and ISM install sheet (if applicable)
  - b. Bid presentation scheduled at time of assessment with all three parties present - no sooner than 5 business days from assessment, no later than 10 business days.

### **Analysis and Project Scoping**

8. HP Assessment results entered into HomeCheck by EA (within 48-hours of assessment) and informs Contractor that information has been entered.
9. EA sends CSG Project Coordinator HomeCheck Analysis
10. Contractor sends CSG Project Coordinator Invoice for Assessment
11. CSG Project Coordinator sends initial assessment invoice to admin team for FastTrack processing of fees paid to contractor and CSG
12. Contractor enters proposed measures into HomeCheck and determines measure package costs and prepares a Bid Proposal based upon acceptable energy efficiency percentage gains and price cap as calculated from HomeCheck and per the CEWP Phase III Proposal Cost Worksheet (see following for reference)
  - a. Bid Proposal needs to structured with scope items listed under the groupings per the CEWP Phase III Proposal Cost Worksheet
  - b. Within 5 business days of assessment, Contractor needs to forward acceptable Bid Proposal to EA and inform EA that proposal is in HomeCheck
13. EA will verify information in HomeCheck and input proposal into the CEWP Phase III Proposal Cost Worksheet to confirm acceptability and prepare estimated incentives, loan amount, and monthly payment information for SBEC.
14. CSG Project Coordinator notifies SBEC of completed Assessment and proposed measure costs
15. EA gathers bid proposals on Contractor letterhead and fills out the SBEC Loan verification form(s) and Estimated Incentive and Fee Disclosure Form
16. Bid proposal presented in person at the home with homeowner and EA (contractor optional)
  - a. Homeowner doesn't sign or wants changes and bid negotiation happens for no longer than 10 business days
    - i. If homeowner and contractor cannot arrive at acceptable proposal in designated 10 business days, homeowner will be given option to request **one** competing proposal from another participating contractor in the pool and will be responsible for the additional \$300 fee. This second contractor will be determined by the administrative team based on offering a balanced number of opportunities to the contractors in the pool, availability, and homeowner preference. This second contractor will be given the test-in information (not the proposal information), and an opportunity to walk thru the home.
  - b. Homeowner signs accepted bid and Loan Verification Form

## Financing and Construction

17. Coordinator sends signed bid proposal, cost-savings spreadsheet tool, Estimated Incentive and Fee Disclosure Form and Loan Verification Form to SBEC for approval
  - a. EA communicates to homeowner and Contractor that the package has been forwarded to SBEC and opportunity to sign loan documents
18. Loan Approved by SBEC and loan documents available for signing (no sooner than 10 business days from receipt of package from Coordinator, due to Mortgage Consumer Lending laws)
19. Participant signs loan papers: SBEC gives CSG go ahead
20. Participant signs contract with contractor and project begins
21. Contractor notifies EA of anticipated construction timeline (work to be completed within 30 calendar days), including anticipated test-out date (range)
22. QC inspection occurs after work is complete
  - a. If corrective actions are necessary, contractor is called back to correct
  - b. If no corrective actions are necessary, homeowner signs QC form, acknowledging proposed work has been completed.
23. At Test-out the homeowner, EA and Contractor all present.
  - a. Contractor provides and gets participant signatures on final invoice and incentive applications 320CEWP and 340E
  - b. EA gathers test-out info, and enters into HomeCheck
  - c. EA generates and signs Certificate of Completion
24. Coordinator sends signed final invoice (**not** to be marked "Paid in Full") and incentive applications for incentive processing
25. Energy Advocate sends homeowner Final Incentive and Fee Disclosure Form
26. Coordinator sends signed final invoice, Final Incentive and Fee Disclosure Sheet and Certificate of Completion to SBEC for contractor payment
27. Loan funded; SBEC pays contractor for completed work and notifies utility of payment amount/schedule for inclusion on bill

# CEWP Phase III Proposal Cost Worksheet - Information

## energy efficiency percentage gains and price cap

Fuel Source - Electric			Fuel Source - Gas		
Energy Efficiency Improvement Package	Portland Clean Energy Fund		Energy Efficiency Improvement Package	Portland Clean Energy Fund	
	Maximum Package Cost	Minimum Energy Savings (HomeCheck)		Maximum Package Cost	Minimum Energy Savings (HomeCheck) <sup>1</sup>
Basic Weatherization	\$4,300	10.0%	Basic Weatherization	\$4,300	10.0%
+ Hot Water	\$5,500	10.0%	+ Hot Water	\$8,150	10.0%
+ Heat	\$14,150	20.0%	+ Heat	\$9,950	20.0%
+ Hot Water and Heat	\$15,700	20.0%	+ Hot Water and Heat	\$14,200	20.0%
Extended Weatherization	\$8,800	20.0%	Extended Weatherization	\$8,800	20.0%
+ Hot Water	\$9,600	20.0%	+ Hot Water	\$12,300	20.0%
+ Heat	\$18,300	30.0%	+ Heat	\$14,100	30.0%
+ Hot Water and Heat	\$19,850	30.0%	+ Hot Water and Heat	\$18,300	30.0%

## scope item groupings

Fuel Source - Electric			Fuel Source - Gas								
Energy Efficiency Improvement Package	Energy Efficiency Improvement Measure	Unit Type	Energy Efficiency Improvement Package	Energy Efficiency Improvement Measure	Unit Type						
Basic Weatherization	Blower Door Test	home	Basic Weatherization	Blower Door Test	home						
	Duct Leakage Testing	home		Duct Leakage Testing	home						
	Air Sealing	home		Air Sealing	home						
	Duct Sealing	duct system		Duct Sealing	duct system						
	Duct Insulation	duct system		Duct Insulation	duct system						
	Knee Wall Insulation	square footage		Knee Wall Insulation	square footage						
	Rim Joist	square footage		Rim Joist	square footage						
	Attic Insulation	square footage		Attic Insulation	square footage						
	+ Hot Water	Water Heater		piece of equipment	+ Hot Water	Water Heater	piece of equipment				
High-Efficiency Water Heater		piece of equipment	Tankless Water Heater	piece of equipment							
High-Efficiency Heat Pump		piece of equipment	High-Efficiency Gas Furnace	piece of equipment							
+ Heat	High-Efficiency Heat Pump	piece of equipment	+ Heat	High-Efficiency Gas Furnace	piece of equipment						
						Extended Weatherization	Blower Door Test	home	Extended Weatherization	Blower Door Test	home
							Duct Leakage Testing	home		Duct Leakage Testing	home
							Air Sealing	home		Air Sealing	home
							Duct Sealing	duct system		Duct Sealing	duct system
							Duct Insulation	duct system		Duct Insulation	duct system
							Knee Wall Insulation	square footage		Knee Wall Insulation	square footage
							Rim Joist	square footage		Rim Joist	square footage
							Attic Insulation	square footage		Attic Insulation	square footage
							Wall Insulation	square footage		Wall Insulation	square footage
						Floor Insulation	square footage	Floor Insulation	square footage		
						+ Hot Water	Water Heater	piece of equipment	+ Hot Water	Water Heater	piece of equipment
							High-Efficiency Water Heater	piece of equipment		Tankless Water Heater	piece of equipment
							High-Efficiency Heat Pump	piece of equipment		High-Efficiency Gas Furnace	piece of equipment

Form 371P  
**Clean Energy Works Portland – Pilot Contractor Participation  
Application**



**Oregon Home Performance with ENERGY STAR® Program—  
Pilot Phase III**

**Home Energy Solutions—Existing Homes**

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*Conservation Services Group (CSG) is a Program Management Contractor for Energy Trust of Oregon, Inc.*

**EXHIBIT B**

Request For Wage Determination And  
Response To Request

(Davis Bacon Act as Amended and Related Statutes)

U.S. Department of Labor

Employment Standards Administration  
Wage and Hour Division



<p style="text-align: center;"><b>FOR DEPARTMENT OF LABOR USE</b></p> <p>Response To Request</p> <p><input type="checkbox"/> Use area determination issued for this area</p> <hr/> <p><input checked="" type="checkbox"/> The attached decision noted below is applicable to this project</p> <p>Decision Number <b>2009-OR-001</b></p> <p>Date of Decision <b>8-31-2009</b></p> <p>Expires <b>3-3-2010</b></p> <p>Supersedes Decision Number</p> <p>Approved  <i>Shirley Ebbesen</i> Shirley Ebbesen Director, Division of Wage Determinations</p> <p>Expiration date and Extension Per 29CFR 1.6 (a)(1)</p>	<p style="text-align: center;">Mail Your Request To:</p> <p style="text-align: center;"><b>U.S. Department of Labor Employment Standards Administration Wage and Hour Division Branch of Construction Contract Wage Determinations Washington, D.C. 20210</b></p> <p>Requesting Officer (Typed name and signature) Lisa Kuzniar Lisa.Kuzniar@netl.doe.gov <i>Lisa Kuzniar</i></p> <p>Department, Agency, or Bureau Department of Energy/National Energy Technology Laboratory</p> <p>Date of Request: 08/11/2009      Estimated Advertising Date:      Estimated Bid Opening Date:</p> <p>Prior Decision Number (If any): N/A      Estimated \$ Value of Contract:      Type of Work:</p> <p style="margin-left: 40px;"><input type="checkbox"/> Under 1/2 Mil    <input type="checkbox"/> 1 to 5 Mil    <input type="checkbox"/> Bldg.    <input type="checkbox"/> Highway <input type="checkbox"/> 1/2 to 1 Mil    <input checked="" type="checkbox"/> Over 5 Mil    <input checked="" type="checkbox"/> Resid.    <input type="checkbox"/> Heav</p> <p>Address to which wage determination should be mailed. (Print or type)</p> <div style="border: 1px solid black; padding: 5px; margin: 5px;"> <p>3610 Collins Ferry Rd. PO Box 880 Morgantown, WV 26507</p> <p>Fax Number 304-285-4683</p> </div> <p>Location of Project (City, County, State, Zip Code) State of Oregon - all counties</p> <p>Description of Work (Be specific) (Print or type) <b>RESIDENTIAL WEATHERIZATION CONSTRUCTION</b></p> <p>Describe the work to be performed . Minor repairs, batt insulation, blown insulation, window &amp; door repair and weatherstripping; air sealing; caulking; replacement of windows, doors; furnace/cooling major overhaul or replacement; furnace/cooling tune up and repair; electrical repairs; minor or incidental structural repairs; plumbing work; duct sealing and/or repair and/or replacement.</p>	<p style="text-align: center;">CHECK OR LIST CRAFTS NEEDED (Attach continuation sheet if needed)</p> <p><input type="checkbox"/> Asbestos workers</p> <p><input type="checkbox"/> Boilermakers</p> <p><input type="checkbox"/> Bricklayers</p> <p><input checked="" type="checkbox"/> Carpenters</p> <p><input type="checkbox"/> Cement masons</p> <p><input checked="" type="checkbox"/> Electricians</p> <p><input type="checkbox"/> Glaziers</p> <p><input type="checkbox"/> Ironworkers</p> <p><input type="checkbox"/> Laborers (Specify classes)</p> <p><input checked="" type="checkbox"/> HVAC Mechanic</p> <hr/> <p><input type="checkbox"/> Lathers</p> <p><input type="checkbox"/> Marble &amp; tile setters, terrazzo workers</p> <p><input type="checkbox"/> Painters</p> <p><input type="checkbox"/> Piledrivermen</p> <p><input type="checkbox"/> Plasterers</p> <p><input checked="" type="checkbox"/> Plumbers</p> <p><input type="checkbox"/> Roofers</p> <p><input checked="" type="checkbox"/> Sheet metal workers</p> <p><input type="checkbox"/> Soft floor layers</p> <p><input type="checkbox"/> Steamfitters</p> <p><input type="checkbox"/> Welders-rate for craft</p> <p><input type="checkbox"/> Truck drivers</p> <p><input type="checkbox"/> Power equipment operators (Specify types)</p> <p><input checked="" type="checkbox"/> Weatherization Worker</p> <hr/> <p>Other Crafts</p> <p>_____</p> <p>_____</p> <p>_____</p>
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## OREGON RESIDENTIAL WEATHERIZATION WAGE DETERMINATION

This project wage determination is issued in response to a request from the Department of Energy (DOE) for prevailing wage rates specific to weatherization of residential structures as those structures are defined in the All Agency Memorandum 130 and 131. This wage determination has application only to weatherization construction projects on existing residential structures as described in the SF 308 submitted by DOE. The primary purpose of the project for which this wage determination is being issued is weatherization and is not for the renovation, repair, or new construction of residential structures. All other types of residential construction projects are subject to the published general residential wage determinations for the State of Oregon found on [www.wdol.gov](http://www.wdol.gov).

Weatherization work for purposes of this wage determination is defined as minor repairs, batt insulation, blown insulation, window and door repair, and weather stripping, solar film installation, air sealing, caulking, minor or incidental structural repairs, duct sealing, air sealing, installation of light bulbs, and installation of smoke detectors. In Oregon, the Department's recent survey determined as a matter of prevailing practice that these duties are performed by a weatherization worker classification. The survey also found specialty weatherization work performed on weatherization construction projects. Specialty weatherization work is the (1) replacement of doors and windows; (2) installation and repair of furnace/cooling (HVAC) systems and all associated work involved with the installation of the HVAC system including electrical, pipe, and duct work. Classifications performing this work are also listed on this project wage determination.

Wage payment data submitted for the State of Oregon included wage data information for a weatherization crew chief classification. This classification of worker is essentially a working foreman who performs the same tasks as the weatherization worker, but who is responsible for supervision, job oversight, forms completion, work assignments, and quality assurance. The additional duties are not "laborer or mechanic" work as defined by the Davis-Bacon and related Acts regulations, but are more supervisory in nature. The Department issues various classifications of workers when the duties are defined and distinct from all other classifications of workers on the wage determination. The "laborer or mechanic" duties of the crew chief are not sufficiently distinct to warrant the issuance of a separate classification on the wage determination. Moreover, the Department does not issue separate wage determinations based on a worker's skill, experience or individual training. Therefore, the weatherization crew chief is not listed as a separate classification of worker. The weatherization crew chief must be classified as a weatherization worker and paid at least the applicable wage determination rate of the weatherization worker when performing weatherization work. There is no restriction however to paying the weatherization crew chief more than the weatherization worker wage rate listed on the wage determination.

STATE: Oregon  
 Decision #: **2009-OR-001**

COUNTIES: See below

DESCRIPTION OF WORK: Weatherization construction on existing residential structures to include minor repairs, batt insulation, blown insulation, window and door repair, and weather stripping, solar film installation, air sealing, caulking, minor or incidental structural repairs, duct sealing, air sealing, installation of light bulbs, and installation of smoke detectors. This also includes (1) the replacement of doors and windows and the repair; (2) the installation of hot water heaters and the installation and repair of furnace/cooling (HVAC) systems and all associated work involved with the installation of the HVAC system including electrical, pipe, and duct work.

The following is a key to the county chart below. The first figure in each classification column is the hourly rate and the rate following the “+” is the fringe benefit rate. A blank in the classification column signifies that there is no or insufficient data from either source and therefore no applicable rate.

Any unlisted classifications needed for work not included within the scope of the classifications listed below may be added after award only as provided in the labor standards contract clauses (29CFR 5.5 (a) (1) (ii)).

Weatherization Survey				Existing Residential Wage Determination ( <a href="http://www.wdol.gov">www.wdol.gov</a> )		
Counties	Weatherization Worker	Doors and Window Replacement	HVAC/Furnace/Heating & Cooling Mechanic	Carpenter	Electrician	Plumber
<b>Baker</b>	\$15.00	\$15.00	\$15.75	\$7.25	\$9.50	\$14.64+4.69
<b>Benton</b>	\$12.73+2.78	\$12.73+2.78	\$21.75+5.26	\$15.84 \$15.22+1.15	\$25.65+10.90+3%	\$ 24.40+17.62
<b>Clackamas</b>	\$19.29+33.61	\$19.29+33.61	\$21.37 + 5.26	\$15.84 \$15.22+1.15	\$19.00+6.85+3%	\$ 24.40+17.62
<b>Clatsop</b>	\$13.00+0.25	\$13.00+0.25(Carpenter)	\$19.00+2.17	\$8.06	\$12.50+2.13+3%	\$11.60

Weatherization Survey				Existing Residential Wage Determinations (www.wdol.gov)		
Counties	Weatherization Worker	Doors & Windows Weatherization Worker	HVAC/Furnace/Heating & Cooling Mechanic	Carpenter	Electrician	Plumber
<b>Columbia</b>	\$15.00+0.29	\$23.75+1.37	\$21.37+5.76	\$15.84 \$15.22+1.15	\$19.00+6.85+3%	\$ 24.40+17.62
<b>Coos</b>	\$13.00+0.25	\$13.00+0.25	\$19.00+2.17	\$9.42	\$10.78	
<b>Crook</b>	\$14.00+1.71	\$14.00+1.71	\$15.75	\$7.25	\$14.60	\$11.01
<b>Curry</b>	\$13.00+0.25	\$13.00+0.25	\$19.00+2.17	\$9.42	\$10.78	
<b>Deschutes</b>	\$13.00+3.27	\$13.00+3.27	\$21.37+5.76	\$7.25	\$14.60	\$11.01
<b>Douglas</b>	\$16.00+0.31	\$22.00	\$25.00+0.48	\$7.79	\$15.03+1.98+3%	\$11.12+2.30
<b>Gilliam</b>	\$14.00+1.71	\$14.00+1.71	\$15.75	\$12.50+2.13+3%	\$8.00	\$9.00
<b>Grant</b>	\$15.00	\$15.00	\$15.75	\$7.50	\$8.00	\$9.00
<b>Harney</b>	\$15.00	\$15.00	\$15.75	\$7.50	\$8.00	\$9.00
<b>Hood River</b>	\$14.00+1.71	\$14.00+1.71	\$15.75	\$12.50+2.13+3%	\$12.50+2.13+3%	\$12.00+3.80
<b>Jackson</b>	\$13.00+3.27	\$13.00+3.27	\$21.37+5.76	\$15.84 \$15.22+1.15	\$27.40+6.90+3%	\$ 24.40+17.62
<b>Jefferson</b>	\$14.00+1.71	\$14.00+1.71		\$7.25	\$14.60	\$11.01
<b>Josephine</b>	\$16.00+0.31	\$22.00	\$25.00+0.48	\$9.00	\$15.03+1.98+3%	\$12.00
<b>Klamath</b>	\$14.00+1.71	\$14.00+1.71	\$15.75	\$7.79	\$15.03+1.98+3%	\$11.12+2.31
<b>Lake</b>	\$14.00+1.71	\$14.00+1.71	\$15.75	\$7.50	\$8.00	\$9.00
<b>Lane</b>	\$12.73+2.78	\$12.73+2.78	\$21.37+5.26	\$15.84 \$15.22+1.15	\$25.65+10.90+3%* \$21.87+7.70+3%***lying east of a line running north and south from the northeast corner of Coos County to the southeast corner of Lincoln County **Western Portion	\$ 24.40+17.62
<b>Lincoln</b>	\$12.73+2.78	\$12.73+2.78	\$21.37+5.26	\$8.06	\$12.50+2.13+3%	\$11.60

Weatherization Survey				Existing Residential Wage Determination (www.wdol.gov)		
Counties	Weatherization Worker	Doors & Windows Weatherization Worker	HVAC/Furnace/Heating & Cooling Mechanic	Carpenter	Electric	Plumber
Linn	\$12.73+2.78	\$12.73+2.78	\$21.37+5.26	\$8.70	\$15.00+2.42+3%	\$12.18+1.72* \$13.00+1.75 *Northern Half ** Southern Half
Malheur	\$15.00	\$15.00	\$15.75	\$7.25	\$9.10	
Marion	\$18.00+2.84	\$18.00+2.84	\$21.37+5.26	\$15.84 \$15.22+1.15	\$25.65+10.90+3%	\$ 24.40+17.62
Morrow	\$11.00+1.77	\$11.00+1.77	\$15.75	\$7.50	\$8.00	\$9.00
Multnomah	\$15.00+0.29	\$23.75+1.37	\$21.37+5.26	\$15.84 \$15.22+1.15	\$19.00+6.85+3%	\$ 24.40+17.62
Polk	\$18.00+2.84	\$18.00+2.84	\$21.37+5.26	\$15.84 \$15.22+1.15	\$25.65+10.90+3%	\$ 24.40+17.62
Sherman	\$14.00+1.71	\$14.00+1.71		\$12.50+2.13+3%	\$12.50+2.13+3%	\$12.00+3.81
Tillamook	\$12.73 + 2.78	\$12.73 + 2.78	\$21.37+5.26	\$8.06	\$12.50+2.13+3%	\$11.60
Umatilla	\$11.00+1.77	\$11.00+1.77	\$15.75	\$7.25	\$9.50	\$14.64+4.69
Union	\$15.00	\$15.00	\$15.75	\$7.25	\$9.50	\$14.64+4.69
Wallowa	\$15.00	\$15.00	\$15.75	\$7.25	\$9.50	\$14.64+4.69
Wasco	\$14.00+1.71	\$14.00+1.71	\$15.75	\$12.50+2.13+3%	\$12.50+2.13+3%	\$12.00+3.82
Washington	\$15.00+0.29	\$13.50+3.47	\$21.37+5.26	\$15.84 \$15.22+1.15	\$19.00+6.85+3%	\$ 24.40+17.62
Wheeler	\$14.00+1.71	\$14.00+1.71	\$15.75	\$7.50	\$8.00	\$9.00

Weatherization Survey				Existing Residential Wage Determination ( <a href="http://www.wdol.gov">www.wdol.gov</a> )		
Counties	Weatherization Worker	Doors & Windows Weatherization Worker	HVAC/Furnace/Heating & Cooling Mechanic	Carpenter	Electrician	Plumber
Yamhill	\$18.50+2.71	\$18.50+2.71	\$21.37+5.26	\$15.84 \$15.22+1.15	\$25.65+10.90+3% (Northern Portion) \$19.00+6.85+3% (Southern Portion)	\$ 24.40+17.62

Form 371P

**Clean Energy Works Portland – Pilot Contractor Participation  
Application**



**Oregon Home Performance with ENERGY STAR® Program—  
Pilot Phase III**

**Home Energy Solutions—Existing Homes**

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*Conservation Services Group (CSG) is a Program Management Contractor for Energy Trust of Oregon, Inc.*

**EXHIBIT C**

**CEWP DESIGNATED TRAINING PROGRAMS**

**[List of Designated Training Programs to be Provided in Mid-January]**

Return completed form to:

Nicolette Reibold, Clean Energy Works Portland Project Coordinator

**Home Energy Solutions—Existing Homes Conservation Services Group (CSG)**

P.O. Box 847 Portland, Oregon 97207-0847

1.866.311.1822 Fax 866.516.7592

energytrust.org

Form 371P  
Clean Energy Works Portland – Pilot Contractor Participation  
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Oregon Home Performance with ENERGY STAR® Program—  
Pilot Phase III

Home Energy Solutions—Existing Homes

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EXHIBIT D

**Labor Peace Agreement Provisions**

Participating Pilot Contractor Applicant hereby agrees and acknowledges that, if selected as a Participating Pilot Contractor, the following labor peace provisions will apply:

Participating Pilot Contractor agrees that, during participation in the Pilot:

1. Participating Pilot Contractor will not take any action nor make any statement that directly or indirectly states or implies any opposition by that Contractor to the selection by its employees of a collective bargaining representative;
2. Participating Pilot Contractor acknowledges that a labor organization can obtain recognition as the exclusive collective bargaining representative by demonstrating to an agreed upon neutral third-party provider that a majority of the employees in a bargaining unit have shown their preference to have the labor organization be their representative by signing authorization cards indicating that preference;
3. Participating Pilot Contractor agrees to enter into an agreement with the labor organization recognized as described in #2 above which would:
  - a. Prohibit the labor organization from engaging in any picketing, work stoppages, boycotts or any other economic interference with construction during the Pilot
  - b. Provide that the employer and labor organization will submit all disputes relating to employment conditions or negotiation thereof to final and binding arbitration; and
  - c. That any the employer and labor organization will submit all disputes relating to employment conditions or negotiation thereof to final and binding arbitration.

Participating Applicant Contractor Name:

Authorized Signature: