

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



Oregon Home Performance with ENERGY STAR® Program—
Pilot Phase IV

Home Energy Solutions—Existing Homes

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

Phase IV Participating Pilot Contractor Application Form

Applicant Information

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

Clean Energy Works Portland (“CEWP” or the “Pilot”) is more fully described in the **Phase IV Invitation to Participate**; defined terms not otherwise defined in this Phase IV Participating Pilot Contractor Application Form have the meanings assigned to them in the Phase IV Invitation to Participate. On behalf of CEWP, Energy Trust is seeking no more than five new contractors to participate in Phase IV of the Pilot, along with the current Phase III Participating Pilot Contractors, to perform assessments and complete CEWP Phase IV projects. Currently, 12 contractors, selected after a review of a Phase III Participating Pilot Contractor Application process, are undertaking CEWP assessments and projects for Phase III. We expect that these Phase III Participating Pilot Contractors will continue along with newly selected additional Phase IV Participating Pilot Contractors. This Phase IV Participating Pilot Contractor Application (the “Application”) is the application to become one of the new Clean Energy Works Portland Pilot Participating Contractor for Phase IV. To be eligible to apply, a contractor must be an Energy Trust Home Energy Solutions Home Performance with ENERGY STAR trade ally in good standing. To apply, please complete all sections of this Application, read the terms and conditions contained in this **Form 371P** and then sign in the signature box below. **Return your completed and signed Application to Energy Trust at the address below not later than 5:00 PM, Pacific Time, May 10, 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 Phase IV Participating Contractor **Approval Notice**, will the applicant be a Participating Contractor and eligible to participate in the pilot for Phase IV.

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 representatives of the CEWP Community Workforce Agreement Stakeholder Evaluation and Implementation Committee. In order to achieve the work quality and community workforce objectives of the Pilot, selection will be based on an analysis and weighting of many performance and workforce factors. Additionally, assignments for assessments and retrofit jobs during Phase IV will be based on final application scoring; application scores for newly selected Phase IV Participating Pilot Contractors will be compared to the application scores of the current Phase III Participating Pilot Contractors, and assessments and retrofit jobs for Phase IV will be assigned to continuing Phase III and new Phase IV Participating Contractors. More jobs will be assigned to Participating Contractors whose application scores are the highest. The scoring and weighting of

Return completed form to:
Home Energy Solutions—Existing Homes ♦ Conservation Services Group (CSG)

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
1.866.311.1822 ♦ Fax 866.516.7592
energytrust.org

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



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

Home Energy Solutions—Existing Homes

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

these factors is identified below. Applicants and continuing Phase III Participating Contractors will be required to achieve a score of not less than 34 out of a 63 possible Weighted Selection Factors total points in order to participate in Phase IV of the Pilot.

Please either (1) check the appropriate box for each section or (2) provide narrative on separate sheets of paper labeled with the Weighted Selection Factor Number at the top of each sheet. An example of a properly labeled narrative form is attached to the Application as Exhibit A .	Program Use Only	
		Max Available Points
1. Demonstrated experience in the Home Performance with ENERGY STAR program since becoming an Energy Trust Home Performance Trade Ally <input type="checkbox"/> a. 0-20 Home Performance jobs <input type="checkbox"/> b. 21-40 Home Performance jobs <input type="checkbox"/> c. 41-60 Home Performance jobs <input type="checkbox"/> d. 61-80 Home Performance jobs <input type="checkbox"/> e. 80+ Home Performance jobs	3 4 5 6 7	7 _____ _____ _____ _____ _____
2. Quality control compliance in Home Performance installation work-QC Pass Rate Percentage 5/09/09 – 5/10/10 <input type="checkbox"/> a. 41-60% <input type="checkbox"/> b. 61-80% <input type="checkbox"/> c. 81-100%	1 6 7	7 _____ _____ _____
3. Record of exceptional customer service. <input type="checkbox"/> a. Provide customer letter of recognized exceptional service AND invoice from project completed in the last 12 months (multiple letters do not receive additional points) AND <input type="checkbox"/> 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.	4 1-3	7 _____ _____
4. Successful track record in hiring and retaining historically disadvantaged or underrepresented people, including people of color and women. <input type="checkbox"/> a. 5-20% of your direct-hire field staff consists of women, African American, Hispanic, Asian Pacific, Pacific Islander, American Indian, or Alaskan Native <input type="checkbox"/> b. 21-50% of your direct-hire field staff consists of women, African American, Hispanic, Asian Pacific, Pacific Islander, American Indian, or Alaskan Native <input type="checkbox"/> c. 51-75% of your direct-hire field staff consists of women, African American, Hispanic, Asian Pacific, Pacific Islander, American Indian, or Alaskan Native <input type="checkbox"/> d. 76+% of your direct-hire field staff consists of women, African American, Hispanic, Asian Pacific, Pacific Islander, American Indian, or Alaskan Native <input type="checkbox"/> e. 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	1 4 5 7 1-3	7 _____ _____ _____ _____ _____

Return completed form to:
Home Energy Solutions—Existing Homes ♦ Conservation Services Group (CSG)

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
1.866.311.1822 ♦ Fax 866.516.7592
energytrust.org

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



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

Home Energy Solutions—Existing Homes

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

be used.		
----------	--	--

<p>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.</p>	1-7	7 _____
<p>6. Disadvantaged Business Enterprise (DBE) or Minority Business Enterprise/Women Business Enterprise (MBE/WBE) Subcontractors.</p> <p><input type="checkbox"/> a. Contractor is a Certified DBE, MBE, or WBE</p> <p><input type="checkbox"/> b. Contractor has subcontracted with Certified DBE, MBE, or WBE in the last 6 months</p> <p><input type="checkbox"/> 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.</p>	4 5 3	5 _____ _____ _____
<p>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.</p> <p><input type="checkbox"/> a. 5-20% of your direct-hire field staff consists of former participants in registered training or credential- granting apprentice or pre-apprentice programs</p> <p><input type="checkbox"/> b. 21-50% of your direct-hire field staff consists of former participants in registered training or credential- granting apprentice or pre-apprentice programs</p> <p><input type="checkbox"/> c. 51-75% of your direct-hire field staff consists of former participants in registered training or credential- granting apprentice or pre-apprentice programs</p> <p><input type="checkbox"/> d. 76+% of your direct-hire field staff consists of former participants in registered training or credential- granting apprentice or pre-apprentice programs</p> <p><input type="checkbox"/> e. 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.</p> <p>Note: New entry worker/installer weatherization employees shall be hired from Pilot designated training programs in accordance with Section 10 of this Application.</p>	1 4 5 7 1-3	7 _____ _____ _____ _____ _____

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



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

Home Energy Solutions—Existing Homes

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

Hiring from these designated training programs counts toward points for this Weighted Selection Factor #7 because the designated training programs were selected, among other things, based on their ties to apprenticeship and pre-apprenticeship programs. Additionally, other hires, non entry-level hires may be hired through apprenticeship and pre-apprenticeship programs, and credit will be given through this section for hires of this type.		
8. Hire record of at least 80% of employees residing in the Portland metro region since September 2009	4	4 _____
9. Provision of health insurance to employees		7
<input type="checkbox"/> a. Partial employee premium coverage	2	_____
<input type="checkbox"/> b. Full employee premium coverage	4	_____
<input type="checkbox"/> c. Full employee premium coverage with partial dependent premium coverage	6	_____
<input type="checkbox"/> d. Full employee premium coverage with full dependent premium coverage	7	_____
10. Applicant is an Oregon-based contracting firm		3
<input type="checkbox"/> Yes <input type="checkbox"/> No	3	_____
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.		2
Note: New entry worker/installer weatherization employees shall be hired from Pilot designated training programs in accordance with Section 10 of this Application. Graduates of these designated training programs may be formerly incarcerated individuals, and applicants will get credit here if that is the case.	1-3	_____

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



Oregon Home Performance with ENERGY STAR® Program—
Pilot Phase IV

Home Energy Solutions—Existing Homes

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

Terms and Conditions for Participation

1. Incorporation by Reference. In addition to the Terms and Conditions for Participation set forth in this **Participation Application (Phase IV) (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.
2. Information Meetings. Participating Contractor agrees to attend a mandatory Clean Energy Works Portland Phase IV kick-off and training meeting at Energy Trust offices on Friday, May 21, 2010 at 3:00 pm,. The time and place for this meeting is subject to change, and selected contractors will be given final notice of the date and time of this mandatory meeting in the Clean Energy works Portland Phase IV Participating Contractor **Approval Notice** upon selection for Phase IV of the Pilot. 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.
3. Workflow Process. Participating Contractor acknowledges accepts, and agrees to comply with the Portland Clean Energy Works workflow process as set forth in **Exhibit B** to this Application. Participating Contractor further agrees and accepts that during the Portland Clean Energy Works Phase IV period, Energy Trust may change the workflow process with notice to Participating Contractor and Participating Contractor agrees to adopt any such revised workflow process.
4. 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 IV application scores were highest.
5. 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.
6. Pilot Acceptable Measures.
Participating Contractor acknowledges and agrees that the following measures represent the only energy efficiency measures eligible for processing through the Pilot.
 - a. Basic Weatherization – air sealing, duct sealing, duct insulation, and attic insulation
 - b. Extended Weatherization – air sealing, duct sealing, duct insulation, attic insulation, wall insulation, and floor insulation
 - c. Space Heating – heat pump or high-efficiency gas furnace
 - d. 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.
7. 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 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 Home Performance reporting software. Participating Contractor acknowledges and agrees that the "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 amounts not less the particular federal prevailing wage hourly rate, together with fringe rate, as set forth on **Exhibit C** to this Application.

Return completed form to:

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

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
1.866.311.1822 ♦ Fax 866.516.7592
energytrust.org

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



Oregon Home Performance with ENERGY STAR® Program—
Pilot Phase IV

Home Energy Solutions—Existing Homes

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

10. Designated Training Program Hiring. Participating contractors agree to hire 100% of new worker/installer weatherization employees from the 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 D**.

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 E** and on the Signature and Representations Box below.
13. Reporting Requirements. During the Clean Energy Works Portland Pilot Phase IV period, Participating Contractor agrees to report required data for each job completed during Phase IV in the reporting form provided by the Pilot as set forth in **Exhibit F** attached hereto. Such reports shall be due twice monthly, not later than the 1st and 15th of each month for all jobs for which test-out has occurred prior to twenty (20) days before such dates. Examples: If a test-out occurs on the 2nd, reporting is due on the 1st of the following month; if a test-out occurs on the 14th, reporting is due on the 15th of the following month. Participating Contractor acknowledges and agrees that all reporting required under this term will be true and correct and may be made available to members of the public and Clean Energy Works Portland Pilot participating homeowners, upon request. Failure to file required reports may subject Participating Contractors to corrective action including, but not limited to, termination from eligibility to participate in the Pilot.
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.

(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.

Return completed form to:

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

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
1.866.311.1822 ♦ Fax 866.516.7592
energytrust.org

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



Oregon Home Performance with ENERGY STAR® Program—
Pilot Phase IV

Home Energy Solutions—Existing Homes

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

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 the Home Performance reporting software 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.

Return completed form to:

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

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
1.866.311.1822 ♦ Fax 866.516.7592
energytrust.org

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



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

Home Energy Solutions—Existing Homes

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

CEWP Pilot Phase IV Maximum E2 Package Cost and Minimum Energy Savings

Fuel Source - Gas		
Energy Efficiency Improvement Package	Portland Clean Energy Fund	
	Maximum Package Cost	Minimum Energy Savings ¹ (Software Model)
Basic Weatherization	\$4,300	10.0%
+ Hot Water (Tank)	\$5,700	10.0%
+ Hot Water (Tankless)	\$8,300	10.0%
+ Heat (Gas Furnace)	\$9,800	25.0%
+ Hot Water (Tank) and Heat	\$11,200	25.0%
+ Hot Water (Tankless) and Heat	\$13,800	25.0%
Extended Weatherization	\$8,800	20.0%
+ Hot Water (Tank)	\$10,200	20.0%
+ Hot Water (Tankless)	\$12,800	20.0%
+ Heat (Gas Furnace)	\$14,300	35.0%
+ Hot Water (Tank) and Heat	\$15,700	35.0%
+ Hot Water (Tankless) and Heat	\$18,300	35.0%

Fuel Source - Electric		
Energy Efficiency Improvement Package	Portland Clean Energy Fund	
	Maximum Package Cost	Minimum Energy Savings (Software Model)
Basic Weatherization	\$4,300	10.0%
+ Hot Water (Tank)	\$5,700	10.0%
+ Heat (Heat Pump)	\$13,800	25.0%
+ Hot Water and Heat	\$15,200	25.0%
Extended Weatherization	\$8,800	20.0%
+ Hot Water (Tank)	\$10,200	20.0%
+ Heat (Heat Pump)	\$18,300	35.0%
+ Hot Water and Heat	\$19,700	35.0%

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.

Return completed form to:
Home Energy Solutions—Existing Homes ♦ Conservation Services Group (CSG)

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
 1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
 1.866.311.1822 ♦ Fax 866.516.7592
 energytrust.org

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



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

Home Energy Solutions—Existing Homes

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

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 Home Performance reporting 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 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 final payment disbursement.
20. Payment. Subject to approval by SBEC of all necessary financing documentation, SBEC will disburse final 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 Pilot at any time for violation of any of these Terms and Conditions for Participation, or for any other reason in the sole discretion of Energy Trust. 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 Pilot as set forth in information provided to Participating Pilot Contractor during this phase.

Return completed form to:

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

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
1.866.311.1822 ♦ Fax 866.516.7592
energytrust.org

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



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

Home Energy Solutions—Existing Homes

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

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; (IV) 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 E** 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 and subject to all terms and conditions contained herein.

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

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

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

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

Home Energy Solutions—Existing Homes



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

EXHIBIT A

Detailed and Readily Implementable Plan Narrative (250 words or less)

Weighted Selection Factor Number ____

Return completed form to:

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

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator

1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205

1.866.311.1822 ♦ Fax 866.516.7592

energytrust.org

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



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

Home Energy Solutions—Existing Homes

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

EXHIBIT B

Workflow Process

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 and 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), Home Performance Reporting Software data collection sheet and ISM install sheet (if applicable)
 - b. Bid presentation scheduled at time of assessment with all three parties present - around 10 business days later

Analysis and Project Scoping

8. HP Assessment results entered into Home Performance Reporting Software by EA (within 48-hours of assessment) and informs Contractor that information has been entered.
9. Contractor sends CSG Project Coordinator Invoice for Assessment
10. CSG Project Coordinator sends initial assessment invoice to admin team for FastTrack processing of fees paid to contractor and CSG
11. Contractor sends EA Project Scope with measure package costs and prepares a Bid Proposal based upon acceptable energy efficiency percentage gains and price cap as calculated from the Home Performance Reporting Software and per the CEWP Phase IV Proposal Cost Worksheet

Return completed form to:

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

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
1.866.311.1822 ♦ Fax 866.516.7592
energytrust.org

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



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

Home Energy Solutions—Existing Homes

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

- a. Bid Proposal needs to be structured with scope items listed under the groupings per the CEWP Phase IV Proposal Cost Worksheet
- 12. EA will verify information, enter measure costs into the Home Performance Reporting Software 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.
- 13. EA gathers bid proposal on Contractor letterhead and fills out the SBEC Loan verification form(s) and Estimated Incentive and Fee Disclosure Form
- 14. Bid proposal presented via email or 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. 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

- 15. Coordinator sends signed bid proposal, cost-savings spreadsheet tool, Estimated Incentive and Fee Disclosure Form and Loan Verification Form to SBEC for processing
 - a. EA communicates to homeowner and Contractor that the package has been forwarded to SBEC
- 16. 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)
- 17. Participant signs loan papers: SBEC gives CSG go ahead
- 18. Participant signs contract with contractor and project begins
- 19. Contractor notifies EA of anticipated construction timeline (work to be completed within 30 calendar days), including anticipated test-out date (range)
- 20. 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.
- 21. At Test-out the homeowner, EA and Contractor all present.
 - a. Contractor provides and gets participant signatures on final invoice and incentive application 320HPwES
 - b. EA gathers test-out info, and enters into Home Performance Reporting Software
 - c. EA generates and signs Certificate of Completion
- 22. Coordinator sends signed final invoice (not to be marked "Paid in Full") and incentive applications for incentive processing
- 23. Energy Advocate sends homeowner Final Incentive and Fee Disclosure Form

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



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

Home Energy Solutions—Existing Homes

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

- 24. Coordinator sends signed final invoice, Final Incentive and Fee Disclosure Sheet and Certificate of Completion to SBEC for contractor payment
- 25. Loan funded; SBEC pays contractor for completed work and notifies utility of payment amount/schedule for inclusion on bill

Scope Item Groupings

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

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

Home Energy Solutions—Existing Homes

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

EXHIBIT C

Counties	Weatherization Worker	Doors and Window Replacement Worker	HVAC/Furnace /Heating & Cooling, Repair, Installation, Replacement Worker	Carpenter (Excludes Door & Window Replacement, and work listed as performed by weatherization worker)	Electrician (Excludes electrical work associated with HVAC installation, overhaul, and work listed as performed by weatherization worker)	Plumber (Excludes work associated with HVAC installation, repair or overhaul and work listed as performed by weatherization)
Clackamas	\$19.29+7.50	\$19.29+7.50	\$21.37+5.26	\$19.31+2.30	\$19.00+3%+6.85	\$ 24.40+17.62
Multnomah	\$15.00+.29	\$23.75+1.37	\$21.37+5.26	\$18.62+2.30	\$19.00+3%+6.85	\$ 24.40+17.62
Washington	\$15.00+.29	\$23.75+1.37	\$21.37+5.26	\$17.85+2.30	\$19.00+3%+6.85	\$ 24.40+17.62

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

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

Home Energy Solutions—Existing Homes



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

**EXHIBIT D
CEWP DESIGNATED TRAINING PROGRAMS**

Oregon and Southern Idaho Laborers Employers Training Trust

Al DeVita, Training Director

Phone: 541.745.5513

Email: aldevita@osilaborerstraining.org

Pacific Northwest Carpenters Institute

Bob Calwhite, Assistant Director

Phone: 503.595.5445

Return completed form to:

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

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator

1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205

1.866.311.1822 ♦ Fax 866.516.7592

energytrust.org

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



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

Home Energy Solutions—Existing Homes

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

EXHIBIT E

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.

Return completed form to:

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

Attn: Nicolette Reibold, Clean Energy Works Portland Project Coordinator
1515 SW 5th Avenue #105 ♦ Portland, Oregon 97205
1.866.311.1822 ♦ Fax 866.516.7592
energytrust.org

