

clean energy works
PORTLAND



**Pilot Phase IV
Invitation to Apply
Participating Contractor Application**

Clean Energy Works Portland (CEWP) The City of Portland has taken the lead on a pilot program to provide homeowners access to low-interest, long-term financing for quick, easy and affordable investments in energy efficiency. Working with the City, Energy Trust of Oregon, Inc. ("Energy Trust") and its program manager contractor, Conservation Services Group, Inc. ("CSG") expect to oversee up to 500 home loans and coordinate installation of measures by qualified, BPI- certified participating Home Performance trade allies. ShoreBank Enterprise Cascadia, a non-profit Community Development Financial Institution ("SBEC"), will provide the financing for participating homeowners and disburse payment to contractors through a revolving fund seeded with City funds available through the American Recovery and Reinvestment Act of 2009 ("ARRA"). Homeowners participating in this pilot will repay the loans on either PGE, Pacific Power or NW Natural utility bills, depending upon which utility provides the primary heating fuel for the home. Homeowners are assigned an "Energy Advocate" and a participating contractor to perform energy efficiency retrofits consistent with the terms of the pilot program. This pilot program, is known as the "Clean Energy Works Portland" pilot (the "Pilot"). In addition to providing streamlined opportunity for residential energy-efficiency retrofits, the Pilot is intended to promote opportunities for historically underserved communities, and a Community Workforce Agreement was adopted by the City of Portland, Energy Trust, and community organizations in September, 2009 (the "CWA").

U.S. Department of Energy "Retrofit Ramp-Up" Grant The City has been notified that it is a recipient of a \$20 million Retrofit Ramp-Up award from the U.S. Department of Energy. This award is intended to provide funding for a significant statewide scale-up of the Pilot. New eligible contractors are strongly encouraged to apply for this phase of the Pilot. Retrofit Ramp-Up award scale up will require a ready and experienced group of participating contractors.

Previous CEWP Phases In the initial phase of the Pilot, assessments were completed that lead to 24 completed home energy efficiency retrofit projects representing 24 executed loans underwritten by SBEC. In Phase II of the Pilot, participating contractors are currently working with CSG and their Energy Advocates and have completed 70 assessments with the intent of completing 50 home retrofit projects and 50 SBEC Pilot loans. In Phase III of the Pilot, participating contractors are currently working with CSG and their Energy Advocates to coordinate 295 assessments with the intent of completing 207 home retrofit projects and 207 SBEC Pilot loans.

The objective of Phase IV of the Pilot is to complete 170 assessments in order to complete 119 home retrofit projects and 119 SBEC loans. In order to do this, Energy Trust is inviting Phase III Participating Contractors to submit updates to their Phase III Applications if they are interested in continuing work in the Pilot for Phase IV, and Energy Trust is seeking participation of a pool of not more than 5 additional qualified contractors for this Phase.

Participating Contractors

Phase III Contractors Interested in Continuing in Phase IV: Should a Phase III Participating Contractor wish to continue in the Pilot as a Phase IV Participating Contractor, the contractor will be required to submit a status report updating activities and progress to date in achieving their Pilot required workforce goals in a form to be provided. Should a Phase III Participating Contractor demonstrate insufficient progress on previously submitted plans, it may result in an adjustment to current Phase III Participating Contractor scores for purposes of allocation of Phase IV assessments and retrofit job assignments. Failure to make any progress towards workforce goals may be deemed a violation of the terms and conditions of participation, and may result in a suspension or

termination from participation in the Pilot. Additionally, Phase III Participating Contractors must be in compliance with all Pilot requirements, including but not limited to reporting requirements, to be permitted to continue participating into Phase IV of the Pilot.

A selection committee comprised of the Energy Trust, CSG, City of Portland representatives, together with representatives of the CWA Stakeholder Evaluation and Implementation Committee ("SEIC") will review contractor compliance and submitted progress reports. Based on these compliance and reports, Phase III Participating Contractor Phase III application scores may be adjusted up or down by the selection committee. Any Phase III Contractor, who submits a progress reports to continue participating in Phase IV, will not be permitted to continue in the Pilot for Phase IV if the score is adjusted down to below 34 out of the 63 possible Weighted Selection Factors total points. As with Phase III, the numbers of assessments and retrofit jobs assigned in Phase IV will be determined by application response scoring.

New Phase IV Contractors: Energy Trust Home Performance contractors not currently participating in CEWP and interested in applying to participate in Phase IV must complete a full Phase IV Participating Contractor Application. Energy Trust expects that not more than five additional Home Performance contractors will be selected to participate in Phase IV of the Pilot. As in prior phases, contractors are eligible to apply if they are current Energy Trust of Oregon Home Performance with ENERGY STAR[®] participating contractors in good standing. Eligible contractors who submit Phase IV applications will be chosen by the selection committee described above. Selection will be based on an analysis and weighting of several Pilot service delivery and workforce development factors set forth in the Phase IV Participating Contractor Application including, but not limited to, those identified specifically in the "Weighted Selection Factors" section of the application. Successful new Phase IV applicants will be required to achieve a score of not less than 34 out of a 63 possible Weighted Selection Factors total points. The numbers of assessments and retrofit jobs assigned in Phase IV will be determined by application response scoring.

Allocation of Assessments and Retrofit Jobs in Phase IV: Phase IV Participating Contractors, both newly selected and continuing Phase III contractors, should expect to receive assignments for not less than 7 and not more than 15 Pilot-assigned assessments. The exact number of assignments will be determined by application response scoring. The selected contractors with the highest application scores will receive the highest number of assignments.

Pilot Phase IV Anticipated Schedule

The application for new Phase IV Participating Pilot Contractors will be released April 23, 2010. The request for an update and progress report from current Phase III Participating Contractors who are interested in continuing in the Pilot for Phase IV will be distributed also on April 23, 2010. An informational meeting will be scheduled shortly, and all Pilot eligible contractors will be notified of date, time and place soon. It is anticipated that Pilot Phase IV participating contractors ("Phase IV Participating Contractors" including continuing Phase III Participating Contractors) will be notified of their selection by Tuesday, May 18, 2010. A **mandatory** Phase IV kickoff meeting for all selected Phase IV Participating Contractors (both new and current Phase III Participating Contractors who are continuing into Phase IV) will take place at Energy Trust offices on **Friday, May 21, 2010, at 3:00 pm**. Dates, times and locations of these events are subject to change, but prior notice will be given of any change. It is anticipated that Phase IV Pilot home assessments will begin in late May, 2010.