



EXHIBIT A

DOE HQ F 413.26
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HOME ENERGY SCORE Partnership Agreement for Participating Organizations

Home Energy Score Partners include various types of organizations (e.g., utilities, state agencies, local governments, non-profits, contractor associations) that administer the delivery of the Score on a local, state, or national basis. This Partnership Agreement outlines the responsibilities of DOE and the participating Partner. Additional requirements are provided in an addendum entitled "Terms of Participation."

Prior to providing the Home Energy Score, both DOE and its Partner must sign this agreement. DOE may modify this agreement or terms of participation to address lessons learned and future programmatic goals. DOE will notify all Partners at least 30 days prior to making any changes to either the Partnership Agreement or terms of participation. A Partner or DOE can terminate the Partnership at any time by notifying the other party.

DOE Responsibilities

DOE will oversee and maintain the Home Energy Score program, and carry out functions including but not limited to monitoring of Partners, data analysis, development of training and outreach materials, and updates to the Home Energy Scoring Tool (Scoring Tool). DOE agrees to provide the following support to its Partners:

1. Provide Assessors working under a Partner organization with access to the Scoring Tool.
2. Provide access to standard outreach and educational materials for homeowners and Assessors, including online information and training.
3. Provide them access to the Scoring Tool once certification and testing requirements are met.
4. Serve as a technical aid in resolving issues (e.g., software questions) that may arise during implementation.
5. Host webinars and other forums to assist Partners with implementation and to encourage information exchange.
6. Carry out evaluation efforts to measure effectiveness of the Home Energy Score and promote ongoing improvement of the program. Communicate findings to Partners to assist in more effective program delivery.
7. Implement upgrades to the Scoring Tool and other program features as needed and with appropriate notice and communication with Partners.

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Partner Organization Responsibilities

Partner organizations and individuals will deliver the Home Energy Score to homeowners through a variety of channels. Partners may provide the Score as part of a home performance program or as an independent service.

Partners agree to meet the following program requirements:

1. Set a target goal for number of houses to be scored in the first year and beyond. Partners must commit to a minimum of 500 homes per year.
2. Develop an implementation plan outlining how the program will be delivered and integrated into other Partner efforts. Partners should incorporate some type of evaluation in their implementation plan.
3. Designate a primary point of contact for participating Assessors and facilitate the delivery of required contact information to DOE.
4. Verify that Assessor candidates meet credential requirements and provide DOE with the names of the candidates.
5. Inform DOE whenever an Assessor ceases participation under the Partner's program.
6. Adhere to rules regarding use of programmatic materials and the Scoring Tool, as set forth in the program's "Terms of Participation"; monitor participation and performance of Assessors in the program; provide mentoring as required.
7. Carry out quality assurance in accordance with the conditions set forth in the program's "Terms of Participation."
8. Provide feedback on implementation of Home Energy Score and check in on regular basis with your DOE Home Energy Score account manager to discuss plans, issues and findings.

Partner Representative: _____

Organization Name: _____

Title: _____

Email: _____ Phone: _____

Signature: _____ Date: _____

The signing representative must have authority to commit the organization to the terms of this agreement. If your organization is implementing the Home Energy Score on behalf of or sponsored by a state, utility, or local program, a representative from your sponsoring agency must sign below. The sponsoring agency is ultimately responsible for ensuring that the Partner organization (listed above) conduct quality assurance in a timely manner in accordance with the conditions set forth in the program's "Terms of Participation."

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Sponsoring Agency: _____
 Sponsoring Agency Representative (Name): _____ Title: _____

Email: _____ Phone: _____
 Signature: _____ Date: _____

U.S. Department of Energy Representative: _____
 Title: _____
 Signature: _____ Date: _____

HOME ENERGY SCORE
Addendum: Terms of Participation

Please read this addendum in its entirety.

The Home Energy Score Partner Agreement sets forth the principal responsibilities of DOE and its Partners. This addendum to the Partner Agreement provides more detailed requirements related to the following aspects of program delivery:

- Confidential Information
- Assessor Qualifications and Restrictions
- Quality Assurance
- Eligible Homes
- Linking to Other Software Tools
- Home Energy Score Updates
- Use of DOE Materials and the DOE Seal

1. Information Not Confidential

In accordance with Portland City Code Chapter 17.108 (adopted by Ordinance No. 188413 and effective January 1, 2018), Home Energy Scores produced in Portland will be made publicly available through real estate listings. Thus, these scores and any associated information will not be treated as confidential.

2. Assessor Qualifications and Restrictions

All Assessors must meet ALL of the following requirements in order to use the Home Energy Scoring Tool and provide Home Energy Scores.

1. Hold a relevant credential. Individuals interested in becoming Assessors must hold a relevant credential from one of the residential trade organizations listed on the Home Energy Score website. The Home Energy Score program recognizes those credentials as well as more comprehensive certifications offered by these organizations. To see a full list of qualifying credentials offered by these organizations, contact them directly.

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2. Pass the online Home Energy Score tests.

Once an Assessor meets these requirements, DOE will provide a user ID and password in order to access the Scoring Tool. The Assessor can ONLY provide Home Energy Scores as part of services rendered through one of DOE's official Home Energy Score Partners. Assessors cannot score homes that are outside of their Partner's service area.

Exceptions: Assessors working under one of DOE's Home Energy Score Partners may score homes outside of the City of Portland if prior to scoring homes outside the Partner's service area, the DOE Home Energy Score Program Manager approves the Assessor's plan to secure adequate quality assurance services from a different Home Energy Score Partner.

3. Quality Assurance (QA)

To ensure consistent scoring practices across Assessors, the Partner agrees to re-score, on a quarterly basis, a minimum of five percent (5%) of all homes scored using a separate Quality Assurance appointee.

Selection of Homes for QA

Quality assurance scores (QA checks) should be random and distributed across all Assessors within the program. Random QA checks will also be completed on work performed by the newer and less experienced Assessors. QA checks on work performed by experienced Assessors who have consistently scored homes accurately should be a lower priority, but still performed periodically.

QA checks should reflect the make-up of the homes scored. For example, if 75% of a program's scores are completed on homes before improvements are made, then 75% of the QA checks should be performed on homes before improvements are made and only 25% on homes after improvements are made. Each home must be in the same condition for its initial score and the QA check; otherwise, results will likely not correspond.

QA Appointees

QA checks should be performed by a Quality Assurance appointee who works for an independent third party provider or for the Partner directly as approved by DOE. In cases where the Home Energy Score Partner is a private for-profit company with no binding implementation contract with a utility, state, or local government, QA checks must be performed by a third party QA provider. The Quality Assurance appointee must be a Home Energy Score Assessor as well as either a BPI Building Analyst (or higher BPI certification) or a RESNET Rater. The QA appointee should have quality assurance field experience and be more familiar with the Home Energy Scoring Tool than the Assessor being checked. Independent third party QA providers and/or appointees must have previous quality assurance experience and must have completed more than 200 whole house energy audits. There should be no conflict of interest between the third party quality assurance provider and the Home Energy Score Partner. This includes, but is not limited to, installation services in houses assessed as part of the Home Energy Score Program. Prior to initiating

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its quality assurance efforts, the Partner must provide documentation regarding the QA appointee's qualifications to their DOE account manager

QA Process

For each QA check, the QA appointee is required to do an independent field assessment of the home. The QA assessment may occur concurrently with the Assessor initially scoring the home but it must be done independently. The QA appointee must not discuss his or her findings or calculations with the Assessor who scored the home until after each has completed data entry and produced a score. However, after independent scoring is completed, discussion between the QA appointee and Assessor is recommended to identify differences in interpretation or measurement and agree on a preferred approach going forward.

Reviewing QA Results

The score results of the Assessor and the QA check must be comparable. If results for the same home differ by more than one point (on the 10-point scale) OR by more than 10% of estimated energy use (source MBtu), the house must be re-scored. If an Assessor consistently produces scores that are not comparable to the QA check scores, re-training is required and must be completed before the Assessor can score more homes. If there is a consistent discrepancy between a QA appointee's results and various Assessors' results, the QA appointee will require re-training. The Partner is responsible for monitoring and identifying these issues.

In addition to the QA checks, all Partners should perform quality assurance checks on data (desk reviews). While reviewing their Home Energy Score data, Partners should look for discrepancies between Assessors to ensure consistent scoring across the program. For example:

- Is an Assessor consistently scoring houses high or low?
- Are there multiple Home Energy Score sessions for the same house? (Only one official Score Report for a specific assessment date should be associated with each house.)
- Is an Assessor repeatedly using the same values irrespective of house age or other house characteristics?

Mentoring Requirements

The Partner also agrees to provide field mentoring for each new Assessor during their first home scoring session. Mentoring can be performed by either a QA appointee OR another Assessor with experience generating Home Energy Scores for at least 25 homes. During mentored sessions, the new Assessor and mentor are encouraged to communicate throughout the walk-through as well as during the scoring so that the mentor can share their experience and correct the Assessor should there be any misunderstandings of inputs, measurements, assumptions, etc. If mentoring is performed on a one-on-one basis on a house that has not been previously scored, this assessment counts toward the Partner's five percent QA requirement.

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4. Eligible Homes

The Scoring Tool is currently only available to score single family homes, including semi-attached homes (i.e., duplexes, townhouses). Note: Multi-family units cannot be scored using this tool. Partners interested in scoring multifamily buildings should contact DOE's commercial building energy asset score program (asset.score@ee.doe.gov). If questions arise concerning the application and/or use of the Scoring Tool, please contact homeenergyscore@ee.doe.gov or your DOE account manager for clarification and assistance.

5. Linking to Other Software Tools

Software developers can license an application programming interface (API) in order to seamlessly link their tools to the Home Energy Scoring Tool. Software programs that make use of the API will need to satisfy DOE testing requirements to ensure that scoring through the API results in the same calculations as scoring directly through the Home Energy Scoring Tool online.

6. Home Energy Score Updates

In addition to providing homeowners with a Score at the time of the original energy assessment, Assessors and Partners can issue updated Home Energy Scores after the time of assessment.

A home can be rescored if an Assessor performs an energy assessment after the improvements are made to the home.

7. Use of DOE Materials and DOE Seal

The Home Energy Scoring Tool generates a report with three pieces of information:

1. The Home Energy Score graphic, including the home's current Score, its anticipated Score after recommended improvements are made, and estimated savings from improvements. Partners that choose to use the semi-customizable label option may have other information included on the Score page, e.g. estimated costs instead of savings. Partners may include their organization's logo on the Home Energy Score report.
2. Home facts, or the home's asset summary that lists each data point input into the Scoring Tool to generate a Home Energy Score, as well as the home's estimated energy use per year broken down by total MBtu, Score basis MBtu, and fuel type, e.g. electricity in kWh and natural gas in therms.
3. Cost-effective energy improvement recommendations that are broken down as "Repair Now" and "Replace Later." If the Partner chooses to use its own energy upgrade recommendations rather than those generated by the Scoring Tool, a generic Home Energy Score Recommendations page should be included in the final

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report. The blank recommendation page indicates the Assessor will provide recommendations separately from the report.

In its implementation plan, the Partner will describe what information homeowners will receive, and when and how they will receive it, including use of DOE-provided materials or other information provided in conjunction with the Score.

If the Partner would like to incorporate portions of materials provided by the Scoring Tool and/or DOE into its own materials, the Partner must adhere to the following rules. Partners must share an advanced copy of materials that incorporate DOE generated information with their account manager.

1. If a Partner wants to incorporate the DOE seal into any of its materials, it must first receive permission from DOE, UNLESS the seal is to be used in the exact context as it is used on the Home Energy Score graphic (the first page of the Home Energy Score report).
2. If a Partner refers to the Home Energy Score in its materials, the following standard language must appear on that document (on or near the page in which the Home Energy Score is mentioned):

“The U.S. Department of Energy’s Home Energy Score lets homeowners quickly and affordably know how their homes compare to others in terms of energy performance and what steps they can take to improve their home’s efficiency.”

3. If a Partner wants to incorporate the Home Energy Score (i.e., how a home scored on the 10-point scale) in its own homeowner packet, the Partner is encouraged to provide a context for the Score (e.g., show the entire 10-point scale or state that the home scored a “6 out of 10”).

In all cases, Partners are strongly encouraged to work in advance with their DOE Home Energy Score account manager to ensure that a consistent message and clear, accurate information is provided to homeowners. Partners are also encouraged to explain that they are working in partnership with DOE. DOE will work with its Partners to draft acceptable language as needed. Partners are also welcome to use information directly off of the DOE Home Energy Score website to help explain the Score or the program to homeowners.