

Exhibit 1

Strategic Program 3: Clean Energy Improvements in Single-Family Homes

The Portland Clean Energy Community Benefits Fund

Portland voters passed the Portland Clean Energy Community Benefits Fund (PCEF) in November 2018. PCEF is funded through a 1 percent surcharge on the Portland sales of large retailers with \$1 billion in national revenue and \$500,000 in local revenue. The purpose of PCEF is to provide a consistent, long-term funding source and oversight structure to invest in climate action projects, in alignment with the City's climate action goals, that support environmental justice and environmental, social, and economic benefits for all Portlanders.

The PCEF program has *priority populations* who are frontline communities – those hit first and worst by a changing climate, including people with low-income and communities of color. In addition to benefiting priority populations through direct investment in climate action, the program also aims to diversify the green workforce. Priority populations for workers and contractors on PCEF projects include people with disabilities, people experiencing gender or sex-based discrimination in the workplace, women, and people of color.

The Climate Investment Plan

In September 2023, Portland City Council adopted the PCEF Five-year Climate Investment Plan (CIP), allocating \$750 million to fund 16 strategic programs and the Community Responsive Grant program. These investments help reduce greenhouse gas (GHG) emissions and ensure our most impacted residents (frontline communities) are prepared for a changing climate as we support the City's goal of net-zero carbon emissions by 2050.

All programs in the CIP were evaluated with PCEF's equity + climate framework, which considers benefits to frontline communities, community leadership, implementation feasibility, GHG emissions reductions, and accountability.

Strategic Program 3: Clean Energy Improvements in Single-Family Homes

Strategic Program 3: Clean Energy Improvements in Single-Family Homes (SP 3) is one of 16 strategic programs in the CIP. The program invests \$140 million over five years to provide energy upgrades in 3,100 homes, reduce GHG emissions, decrease energy usage and utility bills, and improve homeowner stability while increasing comfort, health, and resiliency. Homes will receive a test-in assessment that follows building science principles, generates estimated energy-saving projections, and test-out quality assurance verification.

SP 3 is designed to assist low- and moderate-income homeowners, as well as low-income renters residing in single-family homes, duplexes, triplexes, and quadplexes. Additionally, it will serve qualifying occupants of condominiums, in-home childcare centers, and congregate housing.

In Portland, there are roughly 42,000 homeowners with income below 80% of AMI, which accounts for 29% of all homeowner households. Many of these homes are older, inefficient, and uncomfortable. This program will fund energy efficiency and renewable energy improvements in low-income, owner-occupied, single-family homes and offer incentives for renters and moderate-income homeowners.

Homes owned and occupied by low-income households will be eligible for deep home energy retrofits and the highest level of program investment. Eligible improvements for rentals and moderate-income owner-occupied units will be limited by lower investment levels and include only measures with the highest impact on emissions reduction and occupant utility bill reduction. Improvements to owner-occupied units will take a whole-home approach, investing more funding per unit in measures that reduce emissions and utilities bills, while also providing health, safety, and accessibility benefits. The following table shows estimated investments levels and number of households to be served by category of ownership type and occupant income.

	# HOMES FIVE-YEAR TOTAL	INVESTMENT PER HOME	ELIGIBLE HOUSEHOLDS
Comprehensive home energy retrofits. Includes blower door and other diagnostic testing.	1,500	Up to \$50K	Homeowners <80% AMI
Limited high-impact energy upgrades. Examples: Ductless heat pumps, attic insulation, and heat pump water heaters.	500	Up to \$15K	Renters <80% AMI
Limited high-impact energy efficiency measures. *May be more comprehensive if additional match provided.	600	Up to \$30K	Homeowners 81%-120% AMI
Limited high-impact energy efficiency measures. *May be more comprehensive if additional match provided.	500	Up to \$15K 50% match required	Homeowners 121%-150% AMI and small in-home childcare and congregate living.

SP 3 Program Structure

SP 3 will be administered by independent contractors who provide program management and delivery services for three distinct program components. The Central Administrator (CA) is the primary contract providing direct service in implementing the single-family home energy retrofit program. The Customer Navigator Program (CNP) and Quality Assurance Provider (QAP) contracts are smaller in size and scope. These contracts will provide specific subject matter expertise. Each of these are likely to be independent contracts that maintain a direct relationship with PCEF and include scopes that require strong collaboration with each other and the PCEF program.

1. **Central Administrator (Exhibit 1.a)** – primary program implementation contract, includes multiple program components including marketing and outreach, customer verification, data management and reporting, direct implementation of efficiency retrofits, training and support program for contractors working on program. This contract will be responsible for management of the majority of program funding.
2. **Customer Navigator Program (Exhibit 1.b)** – contract to provide culturally specific outreach and engagement and to provide customer engagement, education, and program navigation services to help ensure access and benefits to PCEF priority populations.
3. **Quality Assurance Provider (Exhibit 1.c)** – contract provides third party scope review, site inspection, and verification to ensure occupant safety and GHG emissions reduction.

Exhibit 1.a - Central Administrator Scope

Strategic Program 3: Clean Energy Improvements in Single-Family Homes

Central Administrator statement of work

The Portland Clean Energy Community Benefits Fund (PCEF) is requesting proposals (RFP) for a Central Administration (CA) for PCEF's [\(SP 3\)](#). Up to \$133.1M of SP 3 funding will be managed through the CA. This scope is for the CA role. Scopes of work for the Customer Navigator Program (CNP) and Quality Assurance Providers (QAP) are available as Exhibit 1.b and 1.c.

Five-year contract budget	
Program coordination, marketing, administration, and reporting - including numbers 1 through 5 in scope of work.	\$21.6M
Construction payments to contractors for energy improvements performed in participating housing units.	\$108M
Contractor recruitment, management, retention grants, training, and support – number 6 in scope of work.	\$3.5M
Total	\$133.1M

The Central Administrator will be the primary contract implementing SP 3. The CA will provide operations management and central administration for the program; functional areas include 1) program coordination, 2) outreach and marketing, 3) data management and reporting, 4) customer application and qualification, 5) program relationship management and conflict resolution, and 6) contractor recruitment, management, and support. Each of these areas are described in more detail below.

The CA will work collaboratively with PCEF and with the other providers involved in the program including third-party QAP(s) and CNs. All program elements will be designed in collaboration with and approved by the PCEF program.

Scope of work

1. Program coordination

- a. Overall program coordination and communication. Stakeholders include PCEF program staff, customers, contractors, CNs, and QAPs.
- b. Customer navigator coordination and collaboration. Integrate CNs into outreach and service delivery models including: 1) ensuring that the client team (navigators, contractors, QAPs are connected and known to customers, 2) tracking customer-navigator relationship status in program database, 3) twice-yearly program education and feedback sessions for CNs to troubleshoot areas for improvement, 4) ensuring navigator program has access to program guidelines and technical content for education and marketing materials, and 5) coordinating with CNP on outreach campaigns to ensure consistency and reduce market confusion.

- c. QAP coordination and collaboration. Integrate QAPs into service delivery models including: 1) making sure that the customer team (navigators, contractors, and QAPs) are connected and known to customers, 2) tracking QA customer assignments in program database, 3) twice-yearly program education and feedback sessions for QAPs along with contractors to assess current and upcoming work, troubleshoot problem areas, and receive program feedback.

2. Outreach and marketing

- a. Develop outreach and marketing plan for the program, including multilingual and culturally-specific design, to secure program customers from PCEF priority populations, specifically low- and moderate-income households from underserved communities. Evaluate the benefits of integrating a community referral process to compensate community-based organizations for referrals of eligible program participants.
- b. Manage implementation of outreach and marketing activities to secure program participants from PCEF's target populations.
- c. Create and execute a media and public relations strategy to promote the program's success.
- d. Develop and maintain the program's online presence, which may include a website and social media
- e. Create and distribute educational material for program customers on the home energy retrofit process, program guidelines, healthy homes, and maximizing energy efficiency.

3. Data management and reporting

- a. Establish and administer a data management system for the purpose of tracking customer experience and meeting PCEF's monthly, quarterly, and annual reporting requirements. This data will also be made available to PCEF as requested. Data shall be collected and managed to protect individual privacy.
- b. Program reporting database. Develop and maintain a project reporting system to provide access to PCEF-required project reporting information including, but not limited to, information on location of participating households, energy savings, occupant eligibility, households served, workforce and contractor demographics, trade and wage data, outreach and engagement activities, and program financials.
- c. Energy auditing and modeling software. Manage integration of PCEF designated or approved home energy auditing and modeling software into program requirements and reporting. Coordinate initial customization of commercially-available software and manage ongoing project reporting. (Cost assumptions: approximately \$20,000 in third-party software fees.)
- d. Reporting coordination and verification. Coordinate and follow up with program contractors, CNs, and QAPs to ensure that all required project reporting is submitted

within the specified time requirements. Review contractor payroll reporting to verify compliance with the PCEF minimum wage.

- e. Ineligible customer information. Track ineligible customers and the reason(s) they were deemed ineligible.
- f. Contractor key project management metrics. Provide a quarterly report to contractors that includes, but is not limited to, the following key project management metrics: 1) Lead assignment date, 2) Home assessment date, 3) Home energy audit report completion date, 4) Open projects, 5) Project completion date, and 6) Progress toward meeting workforce and contractor equity goals.
- g. Annual 1099 tax forms. Create and disburse 1099 tax forms annually to construction contractors and all other contractors on a project.
- h. Collaborative monitoring and measurement of program performance:
 - i. Participate in monthly meetings with PCEF to establish program policies and procedures, review program progress, and discuss process improvements.
 - ii. Monitor and report progress toward program goals and deliverables including, but not limited to, customer engagement, project metrics, program financials, and individual contractor and overall program compliance with PCEF Workforce and Contractor Equity Goals.
- i. Quarterly reporting. Provide quarterly reporting to PCEF on required program metrics.

4. Customer application and qualification:

Customers of the program must be income qualified and be requesting improvements for a home that has the potential for minimum energy savings and is located within the city of Portland. Customers can only participate in the program one time during the five-year implementation period.

- a. Customer application. Develop and manage a customer application process to secure program customers from PCEF priority populations. The process will 1) accommodate online, mobile, paper, and phone applications, 2) support provision of information and documents needed for eligibility verification, and 3) invite customers, at a minimum, to choose a specific participating contractor, the first available contractor, and/or a CN.
- b. Applicant qualification, approval, and communication. Verify customer eligibility and manage the approval and denial process. Income eligibility can be verified using one or more of the following methods: 1) prior year tax return, 2) prior 30 days paystubs, 3) banks statements, 4) other PCEF-approved income verification method, or 5) participation within the last year in local, state, or federal program(s) with appropriate income qualifications the same or similar documentation requirements as noted above.

- c. Property qualification. Establish property qualification requirements and oversee the approval process for all properties.
- d. Customer feedback. Design and implement customer feedback survey.

5. Program relationship management and conflict resolution

Provide problem-solving and prevention solutions to ensure effective and smooth program operation. Areas of concern may include contractor/customer relationships, lead assignments, ineligible customers or properties, contractor non-performance, or issues related to work conducted at a customer's residence. Program problem solving and prevention should include the following.

- a. Program conflict resolution procedures. Draft procedures for resolving conflicts that are likely to arise, and a structure for annual review and update informed by program implementation experience.
- b. Participation agreements. Design participation agreements that outline the roles, responsibilities, and expectations of all parties involved. Include a description of program conflict resolution procedures.
- c. Contractor lead disbursement protocol. Define and manage the contractor lead disbursement protocol.
- d. Contractor reassignment protocol. Define and manage the protocol for the reassignment of contractors to address and resolve issues related to the contractor/customer relationship.
- e. Contingency fund management. Manage a contingency fund to provide solutions for unforeseen necessary repairs that a contractor is unable to address, ensuring the timely resolution of issues affecting customers and projects.

6. Contractor recruitment, management, and support

- a. Contractor recruitment. Provide outreach to secure home energy-efficiency general contractors for the program. Comply with PCEF Workforce and Contractor Equity Agreement requirements and implement an equitable contractor recruitment strategy.
- b. Contractor selection. Select program contractors who meet the following minimum requirements:
 - i. Demonstrate the ability and capacity to fully commit to participation in the program and to complete a minimum of 30 home energy retrofits to Building Performance Institute (BPI) standards annually.
 - ii. Employ at least one individual with BPI Building Analyst certifications who will directly oversee project installations and participate in all required home energy retrofit training.
 - iii. Commit to adhering to all [PCEF home energy retrofit requirements](#)
 - iv. Agree to the PCEF Workforce and Contractor Equity Agreement, which includes 1) workforce and subcontractor reporting, 2) meeting PCEF's

diverse workforce and subcontractor utilization goals, 3) complying with PCEF's minimum pay requirements, and 4) participation in PCEF respectful jobsite training.

c. Contractor management

- i. Performance review. Track and provide a quarterly report to each contractor on key project management metrics. Provide support to contractors who fall behind in meeting program benchmarks.
- ii. Contractor lead assignment. Disburse leads to contractors following the established lead disbursement protocol.
- iii. Communication. Communicate with contractor, customer, QAPs, and CNs to ensure quality customer experience and compliance with program requirements.
- iv. Contractor payment. Disburse project funds to contractors as follows:
 1. Disburse down payments to contractors for each project upon notification from the QAP that the project scope of work has been approved.
 2. Disburse final project payments to contractors upon notification of project completion from the QAP and confirmation that the contractor has completed final project invoicing and reporting.

d. Contractor support program

- i. Develop and manage a contractor support program to help the program meet its workforce and contractor equity goals and help ensure contractors' success in the program.
- ii. Support contractor compliance with PCEF requirements including, but not limited to, compliance with the PCEF Workforce and Contractor Equity Agreement, and PCEF reporting and home energy retrofit requirements.
- iii. Facilitate a community of practice model of support by providing a minimum of four convenings per year for networking and training opportunities that could include contractor peer-to-peer support, installation and product knowledge development, job and subcontracting announcements, or the general development of building science-based home energy improvement skills and knowledge.

e. Manage home energy retrofit technical training program by providing a workforce and contractor development program designed to teach the skills needed to comply with PCEF's Home Energy Retrofit requirements, and to ensure maximum energy savings while protecting the health and safety of the home occupants. The program will provide training to 300-400 participants and 1,000 hours of mentorship over five years.

- i. The program elements include building science-based training, individual and group mentoring, support for on-the-job training curriculum development, and customer education material.
 - ii. Prioritize selection of diverse trainers to help create a more inclusive and effective learning environment. The program will prioritize the selection of trainers and mentors who are culturally aligned with the diverse home energy retrofit contractors and workers they will be instructing.
 - iii. Training plan. Create a five-year technical training plan that includes:
 - 3. Building Performance Institute Building Analyst (Technician and Professional) training and certification. This shall be provided three times during the first year, and up to two times per year for each of the next four years.
 - 4. Approved energy modeling and project development software training. Three times in year one, up to two times (as needed) in subsequent years.
 - 5. Heat pump training. Two times per year.
 - 6. Additional skills. Up to two annual training sessions that align with industry demands and project needs.
- f. Manage workforce retention and on-the-job (OJT) training grants (\$1.2M budget for hiring and retention grants).
 - i. Administer a program that provides grant funding to:
 - 1. Up to 50 contractors who hire and retain workers for six-month and 12-month FTE from approved workforce development training programs.
 - 2. Up to 80 workers who complete the six-month or 12-month FTE training program.
 - ii. Define qualification requirements.
 - 1. Eligible workers will include at a minimum those participating in PCEF-funded workforce development programs who agree to participate in on-the-job training.
 - 2. Eligible contractors will be limited to those working on the Clean Energy in Single Family Homes Program who have successfully completed at least 20 projects.
 - iii. Support on-the-job training curriculum selection. Provide or facilitate technical support to assist the selection or design of OJT training programs. Curriculum or program selected will teach skills needed to comply with PCEF's home energy retrofit requirements and have verification milestones. Ensure that curriculum selected provides meaningful skill development.
 - iv. On-the-job curriculum approval. Provide or facilitate approval of curriculum or training programs selected.

- v. Verify on-the-job training program compliance. Review and approve payroll documentation. Assure compliance with the PCEF Workforce and Contractor Equity Agreement (WCEA). Track and document or collect documentation of on-the-job training milestone completion.
- g. Administer equipment grant program. Program will provide grant funding to reimburse contractors for the purchase of equipment needed to meet PCEF home energy retrofit requirements (\$400K budget for up to 25 grants to contractors).
 - i. Establish contractor eligibility requirements designed to help the program meet its contractor equity and project completion goals.
 - ii. Establish eligible expenses which may include items such as blower doors and other energy auditing equipment, HVAC installation tools, etc.

Exhibit 1.b - Customer Navigator Program Scope

Strategic Program 3: Clean Energy Improvements in Single-Family Homes

Customer Navigator Program statement of work

The Portland Clean Energy Community Benefits Fund (PCEF) is requesting proposals for the development and management of a Customer Navigator Program (CNP) as part of PCEF's [\(SP 3\)](#). Up to \$4 million in funding will be allocated to the CNP. This scope is for the CNP role. Scopes of work for the Central Administrator (CA) and Quality Assurance Providers (QAP) are available as Exhibit 1.a and 1.c. The CNP is a critical component of SP 3 implementation, helping to ensure that PCEF priority populations access and benefit from this funding opportunity.

The Customer Navigator Program purpose is to help ensure that SP 3 benefits PCEF priority populations. The CNP will do this through culturally specific outreach to identify eligible customers and by providing essential support, education, and guidance to low-income households engaged in home energy retrofit projects as part of SP 3. The primary work of the CNP will be to facilitate a positive and culturally appropriate experience for customers.

Five-year contract budget	
~ 25% of budget allocated to community outreach and customer identification.	~\$1M
~75% of budget allocated to navigation services for low-income households.	~\$3M
Total	\$ 4M

Scope of work

The CNP will secure, train, and manage customer navigators (CNs), conduct outreach activities, and provide program navigation and support services. Customers of SP 3 who live in households with low income (less than 80% of area median income) will have the option of accessing the CNP program. Customers can opt-in to a range of service levels; for example, a customer may only need assistance with the income verification process, while another may benefit from having a CN supporting communication with the contractor doing work in their home for the duration of their project.

The program and its CNs will be available to answer questions, provide language interpretation, provide home energy efficiency education, and help to ensure a positive customer experience.

The successful bidder will design a CNP to help ensure SP 3 benefits PCEF priority populations, specifically households from underserved communities with incomes at 80% or less of area median wage. The program should include an outreach and engagement component to increase the number of customers from PCEF priority populations and components designed to support customers who are participating in the program. Note that customers will be given the option of using a CN by the program's Central Administrator when they sign up for services.

Develop, implement, and manage the following program elements:

1. Coordination with Central Administrator (CA) and Quality Assurance (QA) Providers

- a. Work collaboratively with PCEF and other SP 3 contractors to establish systems and practices of communication with the CA and QAPs that support positive customer experience and outcomes.
- b. Work with CA to integrate cultural awareness training into contractor support and training program.
- c. Work with CA to ensure synergy in outreach activities and to avoid market confusion. Examples include consistency in technical content used in outreach and marketing material, and timing and participation in special campaigns.
- d. Work with PCEF, CA, and QAPs to identify areas of opportunity for ongoing program improvement.

2. Navigator training and support

- a. CN training must include assessing customer need, the home energy retrofit process, program requirements and guidelines, and ways to support customers during a home construction project. All CNs should be able to describe the cost and climate benefits of energy efficiency and training should ensure they are familiar with common energy savings measures including insulation and air sealing, ducted and ductless heat pumps, and hot water heat pumps.
- b. CNs are not expected to be technical experts, but they should develop a strong understanding of building energy efficiency improvements and the home renovation process. The goal is to assist customers in improving understanding between customers, contractors, and others in the program. Training should be designed to support this understanding, and CNs should have access to additional technical resources to support them.

3. Customer navigation support services to reach and benefit PCEF priority communities.

- a. Throughout project lifecycle, offer language interpretation and translation services as needed to ensure effective communication.
- b. Provide services to households with low income as needed throughout their experience with SP 3 including:
 - i. Assistance accessing program resources including ensuring understanding of eligibility criteria and providing application assistance.
 - 1. Note that program qualification will include income verification and if the customer is a renter, securing permission from the property owner.
 - ii. Customer education about recommended energy efficiency measures and options. Households with low income participating in SP 3 should have an understanding of recommended improvements that supports them in making informed decisions about their living space.

- iii. Maintain open and timely communication with customers throughout the project lifecycle. Ensure that customers receive regular updates on project status and progress. Support communication and understanding between contractor and customer.
- iv. Provide project closeout customer education to support understanding about operation of new systems in the household.
- v. Offer post-retrofit follow up for the year following project closeout to support proper operation of new equipment, including a process for customers to ask questions about their new systems and receive proactive communication in the event of extreme cold weather that could impact equipment operations.
- vi. Identify and address any challenges or conflicts that may arise during the project.
- vii. Collaborate with appropriate members of project or program teams to find timely and effective solutions.
- viii. Create a feedback mechanism for community members to provide input on the effectiveness of the services and suggest improvements.

4. Culturally-specific community outreach

These are activities within target communities to raise awareness of the program.

- a. Allow for a range of service delivery models to effectively build and maintain trust with people from different PCEF priority populations.
- b. Leverage collaboration with people and organizations with existing relationships and trust within different priority communities.
- c. Coordinate with the CA to ensure use of current shared marketing collateral and technical content for outreach and engagement material.

5. Reporting and documentation

- a. Maintain accurate records of customer interactions and project-related communications.
- b. Submit all required reporting on project activities in timely manner.

Exhibit 1.c - Quality Assurance Provider Scope

Strategic Program 3: Clean Energy Improvements in Single-Family Homes

Quality Assurance Provider statement of work

The Portland Clean Energy Community Benefits Fund (PCEF) is requesting proposals for Quality Assurance Providers (QAP) for PCEF's [Climate Investment Plan Strategic Program 3 Clean energy improvements in single-family homes \(SP 3\)](#). Up to \$2 million in funding will be allocated to the QAP. This scope is for the QAP role. Scopes of work for the Central Administrator (CA) and Quality Assurance Providers (CNP) are available as Exhibit 1.a and 1.b. QAPs are a critical component of SP 3 implementation, ensuring occupant safety and greenhouse gas (GHG) emissions reduction goals are met.

The Quality Assurance Providers will manage the systems, processes, and tools needed for a quality assurance (QA) program to ensure alignment with the PCEF Home Energy Retrofit Requirements [PCEF home energy retrofit requirements](#). QAPs will review project scopes of work and provide post-construction verification to help ensure that scope design and installations maximize utility bill reduction and energy savings within the program budget while protecting the health and safety of the occupants. The QA program will be based on robust building science principles and follow Building Performance Institute and industry standards.

The QAP is integrated into a broader team supporting SP 3. The QAP reports to PCEF and collaborates with the larger program team that includes the Central Administrator, Customer Navigators, and the contractor assigned to each project.

SP 3 is projected to complete 3,100 home energy upgrades over five years. The program will begin with 100% QA oversight, which will be scaled down over time. The QAPs will work with PCEF and the Central Administrator to determine the parameters of the reduction in QA oversight that maintains GHG emissions target reductions and occupant safety.

Scope of work

Up to \$2M is available to fund QAPs for five years. All program elements will be designed in partnership with, or approved by, PCEF.

The QAP will perform the following functions in support of SP 3.

1. Program coordination and communication

- a. Quality assurance program coordination, communication, and collaboration with stakeholders including PCEF and Central Administrator, customers, contractors, and customer navigators participating in SP 3. All activities will be conducted using an equity-centered lens that maintains sensitivity to the economically and culturally diverse populations served by this program.
- b. Customer and customer navigator coordination and collaboration integrates customer navigators into the QA delivery model by 1) introducing QA team and

explaining the process, 2) establishing clear lines of communication, and 3) being available to answer questions.

2. Information management and reporting

- a. Maintain QA documentation, information, and data for each home energy project and the QA process. This information will be made available to PCEF and Central Administrator staff upon request, and a full document package will be submitted after project completion. Summaries will be reported monthly. Tracking will include a minimum of:
 - i. Project summary sheets with the status of project stages and QA steps.
 - ii. Project-level details from contractor entries into a home energy assessment software program or other submitted documentation. Details will include project measures, costs, and energy-related metrics.
 - iii. Notes on QA reviews, assessments, and recommendations.
 - iv. Program-level cost analysis of implemented measures and identification of outliers.

3. Project quality assurance

- a. Quality assurance oversight. Provide QA for all assigned projects including scope review, site visits, measure(s) verification, and customer communications.
- b. Contractor orientation and project registrations. Provide contractors with a QA process on-ramping orientation and supporting contractor document submission.
- c. Contractor and worker mentoring. Built into the scope approval and inspection processes and carried out in a collaborative, culturally sensitive manner. If mentoring or technical assistance is needed beyond what can be provided during the standard QA process, contractors and their teams will be served through the Central Administrator's contractor and workforce development programs.
- d. Project scope of work review. Review contractor's home assessment, energy audit data and calculations, scope of work, project costs, and scope changes before work is performed for all assigned projects. Verify that the contractor's energy modeling, project design, and costs align with program requirements, including PCEF Eligible Measures, Energy Retrofit Quality Assurance Requirements, PCEF Installation Checklists, and project budgets. PCEF home energy retrofit requirements.
- e. Contractor guidance and recommendations. Provide contractors with recommendations for scope adjustments needed to ensure that PCEF-funded projects are completed to optimize energy savings or renewable generation, as well as health, life, and safety outcomes. The pre-work scope review process is designed to identify issues before they happen and create opportunities for QAPs to guide contractors or their representatives on program requirements, measure standards, and industry best practices.

- f. Site assessments. Coordinate site visits with contractors and building occupants to conduct QA inspections and installation verification. These site visits will be scheduled to minimize disturbance to building occupants.
 - i. Multiple site visits may be required to ensure verification of measures covered in the retrofit process, such as air sealing before attics are insulated, or to re-inspect after corrective actions are implemented.
 - ii. Remote inspections may be used in compliance with program policies that are developed by the Central Administrator in collaboration with PCEF and QAP.

4. Process improvements

- a. Conduct continuous process improvements to QA program procedures, standards, and requirements in collaboration with program stakeholders.
- b. Participate in twice-yearly program education and feedback sessions to assess current and upcoming problem areas and collaborate on solutions.