

Attachment 1: Comprehensive E-bike Access and Support Contract Roles

A - Central Administrator Scope

The Central Administrator (CA) will be the primary contract implementing SP 6. The CA will provide operations management and central administration for the program; functional areas include overall program coordination and communication, program development and implementation, outreach and community engagement, and safety and education programming. The provider will additionally be tasked with recruiting and managing retailers and providing ongoing support to ensure compliance with program requirements. CA areas of responsibility include:

- 1) Overall program coordination and communication. Stakeholders include PCEF program staff, rebate payment processor, bike retailers, customers, contractors, and third-party evaluator.
- 2) Program development and implementation
 - a) Finalize development of program that is informed by research, best practices, and engagement with stakeholders and priority communities. Establish policies and procedures in preparation for program launch.
 - b) Recruit and maintain list of approved bike shops, makes, and models eligible for the program.
 - c) Maintain accurate records of customer interactions and project-related communications.
 - d) In coordination with PCEF program, determine reporting metrics, frequency, and format to be tracked and reported.
- 3) Develop, manage, and implement community outreach, engagement, and marketing plan for the program, including multilingual and culturally specific design, to secure program customers from PCEF priority populations, specifically low-income individuals from underserved communities.
 - a) Develop and maintain the program's online presence, including a website and social media, and create and distribute promotional and educational material for program customers and stakeholders of the e-bike program.
 - b) Design and implement culturally specific outreach activities within target communities to raise awareness of the program.
- 4) Safety and consumer education on e-bikes, including choosing an appropriate and quality e-bike, operation best practices and safety, pedestrian/e-bike safety, e-bike repairs and maintenance, and recommended accessories.

B - Rebate Payment Processor Scope

The Rebate Payment Processor will be responsible for managing the program's voucher approval and payment processing systems. Key functional areas include customer qualification, financial management, payment disbursements, retailer coordination, data management and reporting, technical training, and support.

1. In collaboration with the CA and PCEF staff, the Processor will create a customer application and online portal for the E-bike Rebate Program. This will be a user-friendly and easy-to-navigate application portal.

2. The Processor will provide customer service support by telephone, email, and live web chat to assist residents in completing voucher applications.
3. The Processor will engage with retailers and establish an online access point for bike shops where participating retailers can validate and redeem voucher(s) for qualifying sales and submit documentation to request reimbursement.
4. The Processor will manage funds and reimburse bike retailers for the vouchers redeemed at participating bike shops.
5. The Processor will create training materials for participating retailers to access the voucher portal, redeem vouchers, and submit invoices for voucher reimbursement.
6. The Processor will report data to administrator and PCEF staff.

C - E-Bike Mechanic/Technician Training Initiative Administrator Scope

E-Bike Mechanic/Technician Training Initiative Administrator will be responsible for developing training curriculum, identifying participants, executing the training program, and supporting job placement for program participants.

1. Assess current and future training needs.
2. Develop training program and curriculum for E-bike Mechanics/Technicians.
3. Execute training and curriculum; must include in-person training and classes for 50 participants.
4. Develop program participant guidelines; application materials; and process, review, and approval of participants.
5. Market training programs to the community.
6. Ensure program aligns with PCEF guiding principles and workforce goals.

D - Multifamily E-bike Charging and Storage Initiative Administrator Scope

Multifamily E-bike Charging and Storage Initiative Administrator will be responsible for assessing charging and storage solutions, site identification, approval of program participants, and installing the charging and storage solutions.

1. Overall program coordination and communication.
2. Prepare scope, schedule, management plan, and other project management documentation.
3. Assess examples and best practices for multifamily e-bike charging and storage.
4. Provide recommended pilot structure including location assessment criteria.
5. Implement pilot at multifamily locations within the city of Portland: including design, management, and installation.

E - Strategic Program Evaluator Scope

At the end of the third full year of SP 6 implementation, a third-party evaluator will be responsible for analyzing and determining successes and opportunities for improvement for the overall program and for each of the program elements.

1. Evaluation of the E-bike Rebate Program (Administrator and Processor), E-bike Technician Training Initiative, and Multifamily E-Bike Charging and Storage Initiative.
2. Develop criteria to determine success for each program including utilization, GHG reductions, health and economic benefits, and overall community benefits.
3. Design and execute mix-methods (quantitative and qualitative) data collection customized to SP 6 eligibility guidelines and goals.
4. Evaluate the impact of e-bike ownership and participation in various program elements on travel behavior including driving, bicycling, walking, and use of transportation.