

City Of Portland
Block-By-Block Weatherization Program
2001-2002

Exhibit A

SCOPE OF CONTRACTOR SERVICES

For Multnomah County, Oregon
Department of Community and Family Services
Division of Community Programs and Partnerships (DCPP)

The Block-By-Block (BBB) Weatherization Program is a City of Portland funded, neighborhood-based conservation program providing free air sealing, insulation work and install water heaters in low-income homes. This program will be marketed to lower-income households by partnering with neighborhood associations and neighborhood coalition offices.

Three "Fix-it Fairs" will be held to help residents learn about a variety of home improvement topics including energy savings, buying a new furnace, home security, home repair and improvement, fire safety, water conservation and other fix-it subjects. Do-it-yourself weatherization kits will be distributed at energy efficiency workshops offered at each fair. Qualifying lower income households can sign-up for free energy savings services through Block-By-Block. These residents will receive in-home education and an energy audit to identify cost effective weatherization work to be installed by licensed contractors or Multnomah County staff. Multnomah County will staff a weatherization and energy assistance sign-up booth at all three Fix-It Fairs.

Multnomah County, Department of Community and Family Services Division of Community Programs and Partnerships (DCPP) will perform energy audits to identify measures to be paid for by BBB and select, schedule and pay contractors to perform the work. DCPP will provide in-home energy education, job inspections, submit applications for utility and state weatherization rebates and report to the Office of Sustainable Development.

The contractor shall perform the following.

1. Receive Block-By-Block application from the Office of Sustainable Development, entering names into a client database. The Office of Sustainable Development will deliver up to 200 qualified participant names. These will be added to the existing BBB waiting list (if any) and serviced on a first come first served basis, unless otherwise directed. If during the contract period, it appears that additional qualified enrollments will be needed to meet the goal to weatherize 125 homes, DCPP will notify the Office of Sustainable Development.
2. Provide both qualified and sufficient Energy Auditors to complete energy audits in a timely manner.
3. Contact each BBB participant to schedule and perform a "Home Energy Visit" on each home enrolled. The "Home Energy Visit" has two major components, including, A) an extended weatherization audit that will identify and prioritize weatherization measures and/or opportunities to change out major energy using appliances like water heaters, and B) in-home energy education.

A. Extended Weatherization Audit

- (1) This weatherization/energy audit shall be an assessment with a level of detail to meet minimum requirements of the BBB audit approved for use by State of Oregon and utility programs. Audit methodology, procedures and priority of measures will be jointly agreed to by DCPP and the Office of Sustainable Development. The weatherization program WXEOR is pre-approved for use by DCPP on BBB jobs.

The purpose of the extended audit is to prioritize and identify the most cost-effective insulation, replacement natural gas water heaters and/or oil furnace measures to be installed—keeping in mind that the objective of BBB is to provide one major conservation

measure and air infiltration work at a job cost of about \$950. The energy audit will include identifying the most appropriate cost-effective measure to be installed, the installation of various low cost resource-saving components and a survey of the household's current equipment. The extended audit includes:

- (a) Installing of two compact fluorescent lights, provided by the City of Portland
- (b) Measure and contract for installing low flow showerhead(s), provided by the City of Portland.
- (c) Metering and recording the age and useful life of the refrigerator, when physically accessible, provided by City of Portland.
- (d) Recording the age and useful life of water heater
- (e) Measure tap water temperature and turning the water temperature down at tank if above 131 degree F.
- (f) Recording the furnace age or estimated age and useful estimated life along with replacing the current furnace filter with a washable type and clearly placing a furnace stick stating its age, last service date, filter size and last date the filter with changed. The City of Portland will purchase furnace stickers and filters.

DCPP and the Office of Sustainable Development will jointly revise the priority list which states which measures will be recommended and under which circumstances.

- (2) When a natural gas or oil furnace is present, perform an efficiency test determining net exhaust gas temperature, smoke spot, O2 and CO percentages, and steady state furnace efficiency. Also perform a combustion safety test. The auditor shall include in the audit report their recommendation to either (a) tune the furnace, (b) install a flame retention burner and/or fire box liner (oil furnaces), (c) power vacuum the fire box, (d) clean the oil tank, (e) refer this customer to DCP's program for furnace replacement if eligible and if funds are available, or (f) recommend no action. Furnace tune-ups will be offered along with one insulation measure. Oil burner replacement will be considered a major measure by itself, but may be combined with an insulation measure if an exceptionally good savings opportunity exists to also add insulation.
- (3) When a natural gas furnace and outdated 50-gallon electric water heater are present, the auditor should assess whether replacing the water heat with a 40-gallon natural gas water heater is feasible. Water heater replacement will be considered a major measure by itself, but may be combined with ceiling insulation if no insulation currently exist. The goal of the 2000-2001's program is to install approximately 25 water heaters in BBB households. Please refer to the Water Heater Change-Out Pilot Project Procedures created jointly by NW Natural, Multnomah County and the City of Portland.
- (4) Perform a blower door air leakage test, recording the results, and identifying major infiltration points to be sealed by a subcontractor, or County staff, if an insulation measure is installed.
- (5) Recognizing (a) that many BBB households are also eligible for services under federally funded weatherization programs and (b) that service under DCP a home usually receives full insulation services rather than one major insulation measure, some BBB jobs may be transferred or "rolled-over" for service under DCP's county-wide program. The number of BBB homes rolled over, and the type of rollover, will be mutually agreed on by city and county program managers. In the case of shared rollovers, any utility rebates will be split between BBB and the county based on the percentage of weatherization dollars spent by each agency.

B. In-Home Energy Education.

- (1) DCP staff, as part of the Home Energy Visit, will meet with members of the household to discuss energy use in the home. The objectives of this visit will be to (a) review what uses account for most of the cost of energy, i.e. space heat and hot water, (b) to clearly demonstrate basic energy and water savings equipment maintenance (b) identify actions that household members can take to reduce use, and (c) to enlist a written commitment from the resident to follow through on their Energy Action Plan. Follow-up will include mailing a postcard reminding the customer of their commitment approximately ten days after the home

visit. The targeted time for the energy education component is 30 minutes.

- (2) The Office of Sustainable Development has worked jointly with DCPD to develop the In-Home Education Procedure.
 - (3) As stated in the Extended Weatherization Audit the In-Home Education components will consist of:
 - (a) Installing of two compact fluorescent lights, provided by the City of Portland
 - (b) Measure and contract for installing low flow showerhead(s), provided by the City of Portland.
 - (c) Metering and recording the age and useful life of the refrigerator, when feasible.
 - (d) Recording the age and useful life of water heater
 - (e) Measure tap water temperature and turning the water temperature down at tank if above 131 degree F.
 - (f) Recording the furnace age or estimated age and useful estimated life along with replacing the current furnace filter with a washable type and clearly placing a furnace stick stating its age, last service date, filter size and last date the filter with changed. The City of Portland will purchase furnace stickers and filters.
4. Select contractor(s), schedule and pay for major measure work on approximately 110-125 homes as recommended and prioritized in the energy audit report. Standards for work performance shall comply with the most recent edition of Multnomah County's Weatherization Specifications. For wall insulation, DCPD will require use of dense fill cellulose application for walls, (or an alternative only if approved by the Office of Sustainable Development), with a maximum voided area of five percent. Charges for subcontractor services shall be based upon a predetermined pricing schedule developed by DCPD for use in their state funded weatherization program. The target for average subcontractor cost is \$950 per home.
5. Billing to the Block-By-Block program for this weatherization work will be made using a price schedule similar to the one developed for private sector contractors.
6. By April 30, 2002, provide the Office of Sustainable Development with an accounting report documenting BBB money spent in the first three quarters. The Office of Sustainable Development and Multnomah County will review program spending to determine if a three month contract extension is necessary.
7. Conduct post work inspections on at least 75 percent of the homes weatherized. In general, wall and attic insulation will receive first priority for scheduling inspections with burner replacement having less importance. Infrared scan inspection of wall insulation is desirable, and should be used when equipment is available to determine if the work meets the five- percent maximum voided area standard. The inspection call will also include a blower test when insulation measures are installed. Complete inspections within 10 working days of receipt of contractor invoices.
8. Complete all necessary documentation, and apply for all weatherization rebates and administrative reimbursement from the Oregon Office of Energy, Northwest Natural, Portland General Electric Co., and Pacific Power and Light Co. for all completed weatherization jobs. All applications and supporting paperwork should be submitted by DCPD in a timely manner. Utility and state rebates shall be collected, documented and applied directly to weatherization costs of BBB. This years program budget anticipates receipt of \$25,000 in rebates and administrative reimbursement.
9. Carryover to the 2000-01 BBB weatherization budget any rebates applied for and/or collected but not spent on BBB jobs in previous years. This years budget, Exhibit C, notes approximately zero dollars in carryover rebates (collection is pending) to be used for direct weatherization work this year. Similarly, any unspent rebates from this year's contract will be transferred to the 2001-02 Block-By-Block Program or returned to the Office of Sustainable Development.
10. Keep accurate records on the work performed and the corresponding cost, and deliver a quarterly report, as set out in Section 25, Progress Reports.
11. Maintain a client/job database, and use the database to create quarterly and final reports. All report to be delivered in a mutually agreed upon electronic format.

12. The quarterly reports are to include:

- (a) clients name
- (b) address
- (c) number in family
- (d) number under 6 years old
- (e) number over 6 years old
- (f) number of handicapped people
- (g) household income
- (h) heating utility
- (i) type of space heating
- (j) a breakdown of the measures installed
- (k) blower door reading, etc.
- (l) estimated energy savings per audit

In addition to the statistical information requested above, also include general "lifestyle data" such as:

- (a) if they recycle
- (b) do they perform any outside watering—if so what and how often
- (c) their most commonly used mode of transportation
- (d) do they own a clothes washer

Information gathered by the auditor at the time of the extended audit including:

- (a) how many compact fluorescent light bulbs were installed
- (b) if the auditor was able to install a showerhead, record what the flow of the replaced showerhead
- (c) age of refrigerator
- (d) age of water heater
- (e) temperature of hot water, was the auditor able to turn it down
- (f) age of furnace, did the auditor replace the furnace filter

Quarterly reports should include a status report on each job outlining where the project is at during at the time the report is generated. Some suggested status descriptors are:

- (a) application received
- (b) audited
- (c) work order released (work in progress)
- (d) work complete
- (e) cancelled before audit-why
- (f) cancelled before work scheduled-why
- (g) BBB total job costs
- (h) BBB rebate amount for each job

13. The final report is to include all the above information requested for the quarterly report with the addition of it being in both a written and database format. Additional information needed for the final report is a brief narrative discussing program problems and strengths and recommendations for improvement. Final Report is due no later than August 30, 2002.
14. The City desires to encourage the development of stronger economic bases in the neighborhoods served by BBB, as well as a qualified and experienced labor pool. If private contractors are used for the performance of weatherization services, DCPD shall consider this goal. When possible, preference in selecting contractors shall be given to residents of and businesses located in this year's participating neighborhoods. Additionally, small disadvantaged businesses with previous weatherization experience should be used, when possible.

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Exhibit B
SCHEDULE FOR CONTRACTOR SERVICES

For Multnomah County, Oregon
Department of Community and Family Services
Division of Community Programs and Partnerships (DCPP)

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|----|--|--------------------|
| 1. | Contract begins. | July 1, 2001 |
| 2. | Staff booth a three Fix-it Fairs coordinated by the Office of Sustainable Development. | Winter 2001 - 2002 |
| 3. | Begin home energy visits. | July 1, 2001 |
| 4. | Accounting report documenting BBB money spent in the April 30,2002 | |

first third quarter of 2001/2002.

5. Assign and complete all weatherization work within 60 days of the audit/infiltration date.
The schedule for completion is:
 - 120-125 completed by June 30, 2002
6. Complete inspections on 75 percent of the jobs. Perform inspections within two weeks of receiving contractor invoice. On-going
7. Complete applications for utility and state rebates on all jobs. On-going
8. Contract ends. June 30, 2002
9. Submit final billing to the Office of Sustainable Development. July 16, 2002
10. Submit final report. August 30, 2002

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Exhibit C
BUDGET FOR CONTRACTOR SERVICES

For Multnomah County, Oregon
Department of Community and Family Services
Division of Community Programs and Partnerships (DCPP)

1. Supplies, transportation, office space, and all additional non-personnel expenses to perform the Scope of Work. Perform energy audits and home education visits on all applications delivered to DCPP, post-job inspections, maintain the BBB data base, select, supervise and pay sub-contractors, produce monthly and final reports, and apply for and process weatherization rebates. \$33,000
2. Purchase materials needed to perform the "Extended Energy Audit"

and provide weatherization services such as insulation or install natural gas water heaters, for approximately 125 houses. Qualified subcontractors will perform the major measure weatherization work as identified and directed in the energy analysis.

This budget item will increase beyond \$92,000 as DCPD applies for and collects utility and state rebates and administrative reimbursements for this and previous years work. (see Rebate Budget on the following page)

+92,000

SUB-TOTAL: City Direct Funding \$125,000

3. In addition to the contract budget, a rebate budget of \$25,000 is included (see the following page for details). This represents our best estimate of weatherization rebates to be collected under utility and state rebates and administrative reimbursements for this and previous years work. In no case shall the contractor spend rebate funds prior to receipt from utilities and the state.

(Therefore the combined weatherization rebate budget is zero carry-over, plus \$25,000 new =\$25,000)

+\$25,000

GRAND TOTAL \$150,000

REBATE BUDGET 2001-2002

In addition to the above contracted budget, DCPD will collect rebates and administrative reimbursements from utilities and State weatherization programs for work performed. When collected, current year rebates will be combined with rebates carried over from 2000-01 to be used only for direct weatherization, and will be used after funds in this year's budget for weatherization (item 2, previous page) are expended. If the rebates are not spent in this fiscal year, they will be carried over into next year's Block-By-Block program or returned to the Office of Sustainable Development. The following is an accounting of the source of rebate funds to be used as a supplement to the \$92,000 budgeted for weatherization (item 2, previous page) on the current year's program.

1. Rebates carried over from 2000-01. **\$0**
2. 2000-01 Rebates. As of August 28, 2001 both parties estimate **\$0**
a zero balance for BBB rebates from the 2000-01 program budget.
When a final accounting is completed, the rebates (if any) will be
carried into the 2001-02 budget for direct weatherization.
3. Estimated of rebates to be collected on jobs weatherized
during this current 2001-02 BBB Program. **+25,000**

REBATE TOTAL (estimated) \$25,000