



**CITY OF PORTLAND  
AMENDMENT NO. 6 to  
GRANT AGREEMENT NO. 32001607  
FOR  
HOME ENERGY SCORE PROGRAM IMPLEMENTATION**

This Amendment No. 6 amends Grant Agreement No. 32001607, dated the 14th day of June 2017, by and between Earth Advantage, Inc. ("Grantee"), a nonprofit of the State of Oregon, and the City of Portland, a municipal corporation of the State of Oregon ("City") by and through their duly authorized representatives. This Amendment may refer to Grantee and City individually as a "Party" or collectively as the "Parties."

This amendment was authorized by Ordinance XXXXXX.

The Effective Date of this Amendment is July 1, 2023. The purpose of this Amendment is to authorize funding for fiscal year 2023-2024, increase the not-to-exceed amount and extend term of the grant.

The Grant Agreement No. 32001607 was previously amended as follows:

Amendment No. 1, dated December 7, 2018, extended the term of the Agreement from June 30, 2020 to June 30, 2022, added Home Energy Report retention requirements in case of Agreement termination and authorized scope of work and budget in the amount of \$41,800 for the 2018- 2019 fiscal year. It also amended the grant to a new not-to-exceed amount of \$221,000.

Amendment No. 2, dated December 23, 2019, added Home Energy Score data sharing guidelines and authorized scope of work and budget in the amount of \$20,900 for the 2019- 2020 fiscal year.

Amendment No. 3, dated January 20, 2021, amended the agreement to describe Grantee's role in supporting customer support and compliance monitoring activities and authorized scope of work and budget in the amount of \$34,850 for the 2020-2021 fiscal year.

Amendment No. 4, dated July 1, 2021, extended the Grant Agreement by one year and documented that the funding and oversight of certain Home Energy Score Program Implementation activities were transferred to the Oregon Department of Energy.

Amendment No. 5, dated July 1, 2022, transferred oversight of Home Energy Score program customer service and compliance monitoring to Earth Advantage and authorized scope of work and budget in the amount of \$67,450 for the 2022-2023 fiscal year.

EXHIBIT A

The Parties agree to Amend the Grant Agreement No. 32001607 as follows:

1. The Agreement No. 32001607 not-to-exceed amount of \$221,000 is increased by \$400,000 to a new total not-to-exceed amount of \$621,000 .
2. The Term is extended from June 30, 2023 to June 30, 2028.
3. The City of Portland agrees to pay the \$72,450 to Grantee through June 30, 2024.
4. The Project Manager for this work is changing from Andria Jacob to Brian Garcia.
5. Pricing: Exhibit D is replaced and updated per new Exhibit D\_REVISED attached to and incorporated by reference.

All other terms and conditions of Agreement No. 32001607 remain unchanged by this Amendment and in full force and effect.

This Amendment may be signed in two (2) or more counterparts, each of which shall be deemed an original, and which, when taken together, shall constitute one and the same instrument. The Parties agree that they may execute this Amendment by electronic means, including the use of electronic signatures.

IN WITNESS WHEREOF, the Parties hereby cause this Amendment to be executed.

CONTRACTOR

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name and Title

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Prepared By: Brian Garcia  
Energy Score Program Coordinator  
[Brian.Garcia@portlandoregon.gov](mailto:Brian.Garcia@portlandoregon.gov)

*Sent to Earth Advantage via email at [mwinchel@earthadvantage.org](mailto:mwinchel@earthadvantage.org)*

EXHIBIT A

**Contract Title: HOME ENERGY SCORE PROGRAM IMPLEMENTATION**

**CITY OF PORTLAND SIGNATURES**

By: \_\_\_\_\_  
Bureau Director

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Chief Procurement Officer

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Elected Official

Date: \_\_\_\_\_

Approved:

By: \_\_\_\_\_  
Office of City Auditor

Date: \_\_\_\_\_

Approved as to Form:

By: \_\_\_\_\_  
Office of City Attorney

Date: \_\_\_\_\_

## Exhibit D\_REVISED to Grant Agreement No. 32001607

## Amendment 6 Scope of Work and Budget

FY 2023-28

**EARTH ADVANTAGE ROLES AND RESPONSIBILITIES**

In addition to the ongoing roles and responsibilities agreed to and outlined in Grant Agreement No. 32001607 and its amendments, GRANTEE, will undertake the following additional activities from fiscal years 2023 – 2028:

1. **Perform compliance checks and generate lists of non-compliant homes.** Review a minimum of 10% of publicly accessible online Portland real estate listings to determine whether they meet City of Portland Home Energy Score requirements. Maintain compliance records in a program database and generate mailing lists for homes out of compliance and meet the criteria to receive warning and violation notices.
2. **Provide compliance support services for home sellers and real estate professionals.** Respond to general inquiries from sellers and real estate professionals by operating a Home Energy Score help desk and support home sellers and real estate professionals to correct compliance issues following receipt of a compliance notification.

**BUDGET AND DELIVERABLES**

The attached budget reflects the services Earth Advantage is performing for FY 23-24 in support of the Home Energy Score programs that are funded directly by the City of Portland.

Activity	Deliverable	Funding Awarded
Salesforce database management/maintenance.	Database for tracking compliance information.	\$2,000.00
Annual Green Building Registry maintenance fee	Cost for licensing with Earth Advantage's GBR	\$5,000.00
Review real estate listings for compliance with Home Energy Score requirements.  Generate and provide mailing lists for non-compliance homes.  Provide support to realtors to correct partial compliance issues.	Minimum of 10% of listing reviewed on a quarterly basis.  Compliance data is documented on an ongoing basis. Report monthly on compliance rate.  Spreadsheet mailing list of noncompliant homes and/or direct email contact with realtors with partially compliant listings.	\$39,270.00

EXHIBIT A

Home Energy Score help desk support	Help Desk responds to all incoming inquiries within two business days.  Courtesy email notifications to listing agents (where available) for non-compliant listings.  A weekly report summarizing the nature of inquiries to the help desk.	\$26,180.00
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**Payments**

Upon invoice, Grantee will receive funding in two installments per fiscal year, including the following schedule:

First installment: \$36,225 on December 31, 2023

Second installment: \$36,225 on June 30, 2024