



recommendations, DHEEP will approve the contractors to commence work.

- i. In addition, if any appliances are to be proposed and included in the scope of work, PARTICIPATING CONTRACTOR shall ensure that the Participating applicant is aware of and accepts the particular appliances and/or equipment that are recommended and, furthermore, the PARTICIPATING CONTRACTOR specify the dimensions of the specific appliances to be ordered to ensure that it fits into the physical spaces cut out for them. PARTICIPATING CONTRACTOR shall record the results of the comprehensive audit into BPI equivalent auditing software, or any alternative software or physical form as intended for DHEEP.
- j. PARTICIPATING CONTRACTOR shall also complete a Comprehensive Audit and Work Scope form, which identifies the proposed measures, and shall obtain the homeowner's signature. Such signature is required before work may commence on the subject premises, but can be performed both on the same day of the visit, as long as DHEEP receive the signed Comprehensive Audit and Work Scope form within 24 hours of the audit being completed.

### **Task 5: Project Approval and Installation of Qualifying Measures**

Upon completion of the comprehensive home energy audit covered in Task 4, PARTICIPATING CONTRACTOR shall determine the prices for the proposed measures (considering DHEEP's budget per home). PARTICIPATING CONTRACTOR shall also fill out any additional forms for major appliances included on the work scope, to ensure that they are ordered, if selected. PARTICIPATING CONTRACTOR is required to indicate on final work scope form if appliances are recommended based on the audit findings.

The audit shall include a comprehensive package of Energy Cost Measures (ECMs), using one of the following two methods for cost-benefit analysis:

- Computer analysis using software approved by the U.S. Department of Energy (DOE) or equivalent audit software approved by DHEEP OR,
- A priority list developed using computer analysis of regional housing stock and current energy prices. The priority list shall specify both seasonal and baseload ECMs and identify the type of housing covered by the priority list.

Energy-consumption records are provided by DHEEP, upon request by the PARTICIPATING CONTRACTOR. The audit shall include an analysis of energy



consumption records (at least 12 months) to justify estimates of energy savings from the installed ECMs. DHEEP shall make reasonable effort to provide additional guidance on measure prioritization to PARTICIPATING CONTRACTOR upon request, but expects PARTICIPATING CONTRACTOR to be able to rely on experience and accurate analysis to make effective decisions in the vast majority of cases.

In the case of replacement of major mechanical systems (furnaces, boilers, heat pumps, central air conditioners and domestic water heaters), PARTICIPATING CONTRACTOR shall document the justification for the replacement as opposed to a repair of the existing unit, based on actual or imminent system failure, or prohibitive cost of repair. While age and efficiency of the existing system is a factor, it shall not be the sole determining factor for replacement. In addition, all replacements of central heating or cooling systems requires submittal of a valid Manual J load calculation that takes into account all energy efficiency measures that will significantly impact load and allow for equipment downsizing.

The PARTICIPATING CONTRACTOR may start audit assessments immediately after receiving notification from DHEEP that participating applicants' applications have been approved by the Maryland Historic Trust (MHT). The PARTICIPATING CONTRACTOR can not begin audit assessments without receiving notification from DHEEP, that the participating applicants' application has been approved by the Maryland Historical Trust (MHT).

PARTICIPATING CONTRACTOR may, immediately after receiving MHT approval, perform comprehensive home audit and health and safety measures; and install Basic Direct Install measures without receiving DHEEP administrative approval if the measures: a) have prices that are less than or equal to those for corresponding measures in the approved Price List; and b) are part of a project for an individual dwelling unit whose total cost is less than or equal to \$1500. If any individual measure exceeds its price on the Price List, or if a total proposed project price is greater than \$1500, DHEEP administrative approval must be obtained before proceeding with the work.

### **Task 5.1: No Heating/Cooling**

DHEEP shall work with HVAC licensed contractors on heated and in some cases, non-cooled homes. When approved HVAC systems will receive an upgrade per the work scope provided by the PARTICIPATING CONTRACTOR to DHEEP for approval. Please see previous table which explains Eligibility measure levels.

### **Task 6: Post-Installation Tests and Inspections**



PARTICIPATING CONTRACTOR shall inspect all measures installed under the program, with the exception of appliances not yet delivered and installed by other vendors at the time of job completion and final inspection.

PARTICIPATING CONTRACTOR shall complete a Job Completion and Inspection form, to be provided by Contractor, and shall obtain the Participating applicant's signature to certify Participating applicant's acceptance of and level of satisfaction with work.

### **Task 7: Completed Job Reporting and Invoicing**

Within one week of completing a project, PARTICIPATING CONTRACTOR shall submit via email or hardcopy all project related forms and other required documentation to DHEEP via email or mail, in addition to PARTICIPATING CONTRACTOR'S invoice documentation.

Uploading all required documents and inserting the keyword "Installation," status shall constitute an assertion that the project is completed and a request for payment. DHEEP shall review said records for completeness and compliance with program guidelines and initiate a payment upon approving the project as complete. If DHEEP cannot approve the project as complete, DHEEP shall notify PARTICIPATING CONTRACTOR within 2 business day to request additional information or to make any corrections requested.

Payment of agreed upon Contract Services by PARTICIPATING CONTRACTOR will be paid monthly, by DHEEP, from the first day of the approved invoice; and where applicable, shall be in proportion to services performed within each phase of the scope of services.

### **Task 8: Test-out Inspection Work Orders and Participating applicant Concerns**

PARTICIPATING CONTRACTOR agrees to respond in within 10 business days Test-out field inspection findings and requests for corrections due to quality issues, as well as to Participating applicant concerns or complaints, unless such findings identify an emergency that must be addressed immediately, in which case PARTICIPATING CONTRACTOR shall respond within 1 business day. In either case, the response must include outreach to the Participating applicant to discuss the problem or complaint and to schedule a visit by PARTICIPATING CONTRACTOR to inspect and address the problem at the earliest mutually agreeable time. PARTICIPATING CONTRACTOR shall bear the cost of repairs or corrections that are necessary due to product quality, faulty workmanship, omission of measures covered in the work order and paid for by the program, noncompliance with BPI or alternative program technical standards, or other causes attributed to PARTICIPATING CONTRACTOR'S conduct of work on the



premises. Otherwise, PARTICIPATING CONTRACTOR shall have recourse to reimbursement for additional services rendered, as approved by DHEEP.

## ***b. Scope of Work 2: Services for DHEEP Photovoltaic Solar Energy Installation Services***

### **Task 1: DHEEP Model Solar Home**

In an effort to preserve energy, some homeowners are resorting to alternative sources of electric generation for their homes using solar and/or wind. DHEEP will be selecting one qualified homeowner, who will receive a comprehensive home performance package that includes all of the energy saving measures above (i.e. eligibility levels 1, 2, & 3). Savings goals for this program rely heavily on the quality of work performed to increase the energy efficiency of the overall building envelope. To remain compliant with the local utility supplier, Pepco, DHEEP will be working with Pepco to ensure that the selected Solar PV unit, is connected to the grid, and is approved based on local and national standards. Being connected to the grid through Pepco's Green Power Connection program, the participating utility Participating applicant will be able to install renewable-powered generators, specifically solar photovoltaic (PV) unit, smaller than 10kw, and then sell the unused power back to the power grid.

### **Task 2: Pepco Requirements**

Once selected for the Solar PV unit, the homeowner will work with DHEEP's participating certified solar installer to submit an application and all related documentation to Pepco's Green Power Connection program and DHEEP. The homeowner will enter into agreement with the solar installer to perform the work.

### **Task 3: Scope of Services**

See Attachment D: DHEEP Photovoltaic Solar Energy Grant Terms and Conditions Agreement: Program Participant. The terms and conditions in Attachment D apply to the conditional agreement between the program participant (grantee), Participating contractor (solar installer), and DHEEP. Attachment D is to be signed and executed upon the approval of the scope of services per DHEEP and Pepco Green Power Connection Approval. The contractor must install a photovoltaic solar energy system that meets the requirements set forth in Attachment D. The solar installer will also be required to assist DHEEP in selecting the residential home from the random raffle to install a photovoltaic solar energy system, in order to select the "best candidate" (i.e. based on pre-inspections and audit findings) for the installation.

### **Task 4: Project Close-outs, Inspections and Invoices**

Copies of all documentation required by Pepco Green Power Connection must be submitted to DHEEP prior to commencing work and following the completion and sign offs of work, in order to issue final payment. Once completed, this home