



Clean Energy Works: Portland/Community Workforce Agreement Meeting Minutes

Community Benefit Dialogue
Monday, August 31st from 2:00pm – 4:00pm
Located at the White Stag Building
70 NW Couch St, Portland OR 97204

Individuals Present:

Connie Ashbrook: OTI	Ivan Maluski: Sierra Club
Colin Bishop: Change to Win	Steven McGrath: Sustainable Solutions
Jim Braun: Green Power Electric	Debbie Menashe: Energy Trust
Sara Brockmeier: CSG/ETO	Duke Moten: ICCDC Construction Hope PATP
Barbara Byrd: Oregon AFI-CIO	Judith Mowry: ONI
Bob Calwhite: Carpenters	Ben Nelson: Laborers' Union
Bill Clumpner: Integrated Energy Services	Mary Nemmers: MACG
Al Devita: Laborers' Union Training and Apprenticeship	Tania Parks: Sustainable Solutions
Jesse Dobson: Green Energy Specialists, Inc.	Dianne Riley: Coalition for a livable future
Diane Ferington: Energy Trust	Andrew Reed: PDC
Warren Fluker: Urban League	William Regan: PATTT
John Gardner: CAWS/WSI	Michelle Schleich: CAWS
Jeremy Hays: Green for All	Derek Smith: City of Portland Planning, Sustainability
Alan Hipolito: Verde	John Steffens: Carpenters P.N.C.I
Caitlin Horsley: EOI/PDC	Jonathan Tillmay: CSG
Gene Jackson: City of Portland Purchases	Loretta Young: City of Portland
Jennice Jackson: ICCDC Construction Hope PATP	Adam Zimmerman: Shore Bank
Bev Logan: MACG	

Agenda:

- Welcome
- Introductions
- Overview of RFP/RFQ Process
- Context
- Review of draft Agreement
- Next Steps

Overview of RFP/RFQ Process

Where we are;

- To date there have been 40 home assessments and audits
- Closed 3 loans
- 2 projects started work

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- 6 bid proposal and 16 to be presented
- Currently we are in the pre-pilot phase, the next phase will include the new CWA
- Conversion of audits to projects is estimated around 50% with the pilot bringing 470 projects roughly.

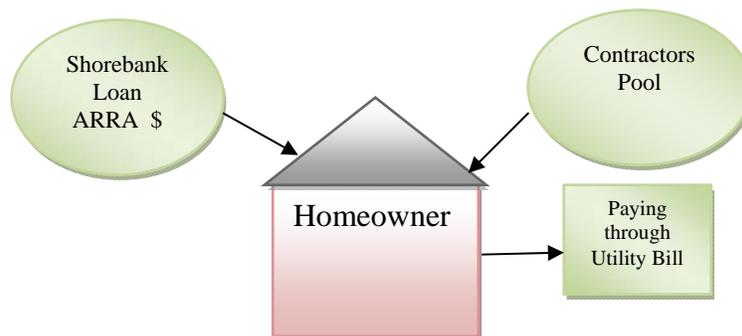
470 Homes

Stage 1	Stage 2	Stage 3	Neighborhood
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- Creating a pool of contractors → Assessments → Project
 - ↓
 - GC and Subs
 - ↓
 - (Audits)

How the program works;

- The Clean Energy Works Program is intended to enable homeowners to access low-interest, long-term financing for quick, easy and affordable investments in energy efficiency and renewable energy.
 - Homeowners sign up for a home energy assessment through Energy Trust of Oregon.
 - Energy Trust will schedule the home energy assessment to be performed by a certified Building Performance Institute contractor and provide an “Energy Advocate” to explain recommended measures and financing options, and help the homeowner through the installation process.
 - Homeowners will choose which options best meet their needs. At least one option will be a scenario where energy savings are projected to equal the cost of the improvements over time.
 - In coordination with the Energy Advocate, the eligible contractor will then arrange to have the energy efficiency improvements made.
 - Repayment is available on their utility bill.



Context

The nature of the CWA:

- The Community Workforce Agreement is developed among community stakeholders around the standards and benefits that we would like represented within the Clean Energy Works project.



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- The CWA applies to just the pilot phase but City would like to adopt these terms going forward with the Scale up process after the pilot
- Portland is a leading city nationwide in its efforts at putting through this type of program. All eyes are on the project to determine if it is replicable.
- By learning from the implementation process, and determining feasibility, the City of Portland would like to set a tone for Oregon and the rest of the Country about its standards and community awareness.

Review of Draft Agreement

****NOTE** – Because this is a small pilot program designed for a scale up stage, some the identified principles were referred for consideration to the scale up phase. Those items are noted within the draft CWA.

Identified Red Flags;

First Page:

- Introduction: Missing the term “Equity” on the first initial page Introduction and throughout document
- General Question: Scale up process - Because it is spread over a period of time, we may not need more contractors over the long period of time then what we have for the pilot.
 - If the pilot is successful this program would be increased by the number of loans.
- Agreement Section: Career Pathway is not mentioned in the “Whereas”
- General Suggestion: Designation of Community Stakeholder seats on City’s Oversight Committee.
- General Suggestion: -Term of “Minority” changed to “Under-represented” communities

I. Contractors:

Section A

- Requirements for contractors to become BPI Certified; this may prove to be a barrier to MWESP participation goals, especially with limited training times
 - Recommendation is to have the City stagger the RFQ’s in stages to provide M/W/ESB Contractors the chance to become certified and participate in the program. Some CBOs expressed strong reservations about agreeing to launch the next round of RFQs for the pilot without more participation of women- and people of color owned contractors in the pool.
 - Subcontractors are not required to be BPI Certified
 - BPI Certifications can be obtained not only through the Energy Trust Trade Ally; but also through Mt. Hood Community College, Synergy, and accredited online providers.
 - **Sara Brockmeier will create a list of BPI Trainings
 - The City of Portland is not only setting a standard for community engagement, but they are also guaranteeing a quality within the program itself.



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- Contractors that are not currently BPI Certified would still be considered contingent upon obtaining the BPI Certification prior to work
- Mandating Prevailing Wage, 180% of Oregon's minimum wage;
 - Because the city was allocated federal funds from the ARRA in which they are leveraging with private capital going forward. Federally requirements will be mandated on this project.
 - Prequalified training programs, recommendation is to forward to the scale up because of the short time frame to establish training programs for this pilot. Laborers union does not support this recommendation and suggested that there are ways to establish qualified training programs and require their utilization in this pilot.
Utilizing the contractors and workers to help facilitate training;
Ensuring outcomes would be hard to implement.
Establishing standards in the training programs (skilled workforce). The pilot would require that the General is certified.
 - Questioning the value add of listing the positions on Work Source, we believe it will help with tracking of essential information. This also helps with tracking minorities and women hired and if they came from a specific training program.

Section B

- Suggestion - M/W/ESB should be its own category
- Suggestion -Wording of "Should" change to "shall"

#3

- Suggestion 15% of women should be higher
- Formally incarcerated individuals may be a concern for homeowners and contractors.
 - There are programs that can help with bonding
 - Individuals that are from training programs designed to help incarcerated rehabilitation have gone through assessments and are mentally on a path of wanting a second chance with society.

II. Creating a Contractors Pool - Methods

Section A

- Having a successful track record in hiring and retaining people of color and women for workforce labor positions such as installers and technicians, not just admin/clerical staff.
- Clarity to how much points added to best value contracting would be weighed in contracting



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IV. Assistance to Contractors and Training Programs

- Assistance to contractors for BPI Training

V. Oversight and Accountability

- Stakeholders want to have strong accountability mechanisms in place to ensure that the pilot achieves delivers the standards and benefits laid out in the CWA.
- Stakeholders want seats on the Committee to include CBOs, Labor, and other stakeholders who sign onto the CWA.
- The City and Energy Trust recommend that the committee have an evaluation and implementation role; that the committee members also contribute to helping the pilot deliver the standards and benefits in the CWA.

Draft Calendar

- 9/16 Evaluation of pre-pilot phase (30 homes)
- By 9/15 finalize Community Workforce Agreement
- 9/21 Results
- 9/22 Discuss Regulations for RFQ's
- 9/23 Council Resolution to establish CWA standards and benefits in project
- 9/25 Finish RFQ
- 9/28 Release RFQ → Bidders conference
- 10/5 Select
- 10/9 Announcement
- 10/14 Work Resumes

Next Steps

- Stake holders continue to review Draft CWA; Please forward any suggestion on additions to agreement or changes via email to michelle@caws-pdx.org
- Reconvene and continue to work through document at next meeting

Next Meeting

The City of Portland Clean Energy Works Dialogues will be held
Wednesday, September 9th
2:00pm – 5:00pm
Located at the White Stag Building
70 NW Couch St, Portland OR 97204

Join Energy Trust of Oregon's Home Performance Network!

Step 1: Become a Trade Ally: Home Energy Solutions—Existing Homes

Expand your business opportunities by participating in Energy Trust's Home Energy Solutions Trade Ally Network.

Energy Trust provides your business with valuable recognition as a qualified professional in the energy-efficiency marketplace through the Home Energy Solutions Trade Ally Network. Membership is free and open to Construction Contractors Board-licensed and insured contractors providing plumbing, heating and cooling, insulation or windows installation services to existing single-family and multifamily residences in Oregon.

Take advantage of the following program benefits:

- Your business listed on our online trade ally directory, available to customers
- Cooperative marketing funds to offset the costs of approved marketing projects
- Ongoing communication through direct contact with Energy Trust's trade ally coordinator, trade ally roundtables and trade ally-specific e-newsletters—keeping you ahead of the energy-efficiency curve
- Discounts on diagnostic equipment and technical training workshops
- In-depth training opportunities, presentations and Webinars (technical, Home Energy Solutions weatherization specifications, quality-control policies, incentive application requirements, GreenStreet Lending, sales and more)
- Networking opportunities with other Energy Trust trade allies

Offer your clients:

- Energy Trust cash incentives for energy-efficient products and services, and exclusive trade ally bonus incentives
- Special promotions that will bring added value
- Information on financing home improvement projects with GreenStreet Lending through Umpqua Bank (an Equal Housing Lender)
- Reliable source for up-to-date information on energy efficiency
- Upgrades that meet Energy Trust requirements and high standards for energy-efficiency

Requirements to become a Home Energy Solutions trade ally:

Home Energy Solutions trade allies are required to follow specific guidelines as listed in the trade ally application materials. To become a trade ally, you must:

- Provide a certificate of state-required worker's compensation insurance
- Provide a certificate of commercial general liability insurance naming Energy Trust of Oregon, Inc., as an additional insured, with limits of not less than \$1 million per occurrence for bodily injury and property damage liability, and an annual aggregate limit of not less than \$1 million. All licenses and certifications must be current for work completed in the state of Oregon.
- Attend a Home Energy Solutions Trade Ally Program training that will help you develop a clear understanding of program benefits, guidelines and requirements. You will also learn how to promote Home Energy Solutions to your customers and how to support the sales and installation of appropriate energy-efficiency equipment.
- Submit a Trade Ally Initial Application Form 1171A and the Trade Ally Network Addendum Form 371A.

Home Energy Solutions Trade Ally Training

[Thursday, September 29th from 1:30-4:30p.m](#)

To register:

- Download application forms and view a complete list of requirements. Please visit our website, www.energytrust.org/TA/hes/index.html
- For more information about the Home Energy Solutions Trade Ally Network, please call 1-866-365-3526 or HESTradeAlly@csggrp.com
- You will receive a letter confirming your trade ally status after you have attended program training and submitted your trade ally application materials.

Step 2: Become a Home Performance with ENERGY STAR[®] contractor

Home Performance with ENERGY STAR is a nationally renowned program promoting the highest standard in residential energy efficiency. A joint venture between Building Performance Institute (BPI) and Pacific Northwest Regional Technical Forum, Home Performance with ENERGY STAR is a market-driven program that offers whole-home energy usage analysis and diagnostics to homeowners. After completing the Home Performance with ENERGY STAR training series, you will be a building-science expert, using your new tools and knowledge to make energy-saving recommendations based on science and proven facts. In addition, this training series will equip you with the following:

- ENERGY Star branding, enabling you to further differentiate your business from the competition
- Access to incentives for your customers
- Free HomeCheck software—a home-diagnostic and work-tracking tool that quantifies benefits and savings estimates from your customers
- Equipment and training discounts, as well as access to cooperative marketing funds
- Attend Energy Trust sponsored HomeCheck software training

To learn about Home Performance benefits to the homeowner and view a short video of a comprehensive Home Performance assessment, visit www.energytrust.org/hp.

Requirements to become a Home Performance contractor:

Home Performance contractors are required to follow specific guidelines as listed in the program ally application materials. To become a Home Performance contractor, you must:

- Be a Home Energy Solutions trade ally in good standing
- Employ at least 1 technician certified in BPI Building Analyst plus BPI Envelope or Heating Professional
- Submit a Home Performance Participation Agreement Form 371E

Energy Trust of Oregon and BPI Training Opportunities

Energy Trust's BPI Trainings

Building Analyst

[Monday, October 19th – Friday, October 23rd](#)

Five-day training covers the fundamentals of building science, shell types and building components, thermal pressure boundaries, air sealing, blower door technology and testing, building calculations, airflow and ventilation, combustion science and safety, cost effectiveness of energy measures, and health and safety.

Envelope Professional

[Tuesday, October 27th – Thursday, October 29th](#)

Three-day training covers the house-as-a-whole system approach to building science, the science of moisture, psychrometrics, thermal and pressure boundaries, air sealing, blower door technology and testing, series leakage, Building Airflow Standards (BAS), ventilation systems, combustion safety, gas leak detection, health and safety, and complete house evaluation.

Heating Professional

[Tuesday, November 10th – Thursday, November 12th](#)

Three-day training covers combustion appliance fundamentals, distribution and fuel types, as well as health and safety issues related to newer and aging equipment. The course will also address in-field combustion efficiency and carbon monoxide testing on existing systems, and duct and pressure diagnostics to identify duct system leakage and problems.

Building Performance Institute (BPI) Certification Requirements:

Trainings consist of classroom and on-site sessions. Written and field exams are required to complete certification. The Building Analyst written exam is 100-question (2-hour time limit); in addition, a 50-question written exam (1.5 hours) is required for Envelope and Heating certification. Energy Trust's Home Performance Account Managers will provide up to three, full day field mentoring sessions to students to build technical comprehension and hands-on experience prior to field exams.

Cost:

\$4000 for Building Analyst, Envelope Professional and Heating Professional

\$3000 for Building Analyst and Envelope or Heating Professional

*Energy Trust offers trade allies a 75% training incentive to help off-set the cost of Energy Trust sponsored BPI Home Performance training.

For more information and to register contact HEStraining@csgpr.com.

Additional BPI Training and Certification Opportunities:

*Additional requirements apply to BPI certified contractors trained outside of Energy Trust sponsored BPI training to join the Home Performance program. Including:

- Submitting proof of BPI certification in Building Analyst and Envelope or Heating Professional
- Attending a Home Performance Orientation

Energy Conservation Training Center

Portland, OR

[Website](#)

Through innovative collaborations with the Building Performance Institute (BPI), Saturn Resource Management Inc. (SRMI), and Oregon's [Mt. Hood Community College](#) (MHCC) we have brought together the components necessary to deliver training programs of the highest quality.

Applications through MHCC. Scholarships available through [WorkSource](#).

Saturn Online

[Website](#)

Saturn delivers training for energy professionals across the country. Our students may need to prepare for certification exams, expand their careers, fulfill job training requirements, or accumulate continuing

education credits. We combine the convenience of online distance learning with focused field training sessions to provide you with the training and testing you need to become BPI Building Analyst certified.

Building Performance Center

Bellingham, WA

[Website](#)

The Building Performance Center is a building performance contractor that provides technical training, diagnostic services, indoor air quality investigations / mitigation and energy efficiency retrofits. We analyze and develop practical solutions to problems associated with building performance and the indoor living environment. The BPC also provides consulting services in organizational and program development.

Olympic College

Bremerton, WA

[Website](#)

Offering a BPI and HERS certification course this fall.

EOS Alliance

Seattle, WA

[Website](#)

This course is intended to provide the knowledge and experience necessary to prepare professionals conducting home weatherization energy audits to pass the Building Performance Institute (BPI) Building Analyst exams, and become a certified Building Analyst. The course material is specifically tailored for energy efficiency professionals working within utility-funded programs and other programs funded through U.S. Department of Energy. It is based on the "Core Competencies for the Weatherization Assistance Program" developed by the Weatherization Trainers Consortium. The course includes ten days of classroom training, five days of field training, and both written and field exams. Both weatherization and energy auditor professionals will benefit from the training and certification.