

PCEF Energy Retrofit Quality Assurance Steps & Requirements

Initial set up: Grantee/contractor connects with QA Provider and receives access and orientation to QA Portal. It will be helpful for grantees to include their contractor(s) in this meeting.

- QA Provider develops QA plan for the project and coordinates with grantee/contractor to approve.
 - Process and required documentation may vary for multi-family, new construction or unique projects.
- 1) **Assessment & Energy Audit** completed
 - Single family test-in *PCEF Energy Retrofit Data Form* and energy modeling completed.
 - Multifamily or new construction projects to provide energy modeling or equivalent.
 - 2) **Scope of Work** developed in accordance with *PCEF Installation Checklists & Eligible Measures*.
 - 3) **Scope of Work and assessment details submitted** via QA Portal, including the following:
 - PCEF Energy Retrofit Data Form with pre-assessment measurements.
 - Scope of Work (with Load & Balance Point Calculations as applicable). Include relevant work that will be completed in addition to the PCEF project.
 - Photos and/or other information when needed.
 - 4) **QA Provider reviews and provides feedback within 5 business days**, and then works collaboratively with grantee/contractor if scope adjustments are needed.
 - Scopes will be assessed for alignment with PCEF Eligible Measures and Installation Checklists, opportunities to maximize energy efficiency or renewables, and health/life/safety elements of the project.
 - 5) **QA Provider** documents scope review completion and **sends email** to grantee/ contractor.

Reminder: Share the PCEF Installation Checklists and Eligible Measures with your contractors.
 - 6) **Should changes to Scope of Work be necessary during the course of a project, grantee/contractor is to notify QA Provider** for review before completing those changes.
 - 7) **Upon completion of work, grantee/contractor fills out the PCEF Intallation Checklist(s)** relevant to the Scope of Work, perform an internal QA check and complete PCEF Energy Retrofit Data Form post-assessment measurements.
 - 8) **Grantee/contractor requests final QA site visit and submits final docs to QA Provider** via QA Portal, including PCEF Energy Retrofit Data Form, test-out energy modeling, completed relevant PCEF Intallation Checklists & photos (if requested by QA provider).

Reminder: Keep copies of finalized permit, & contractor CCB info.
 - 9) **QA Provider will review final paperwork and perform site visit.** If corrections are needed, QA provider will provide guidance and inform grantee/contractor of next steps needed for finalizing the project.
 - 10) **Corrections** shall be completed within 30 days.
 - 11) **QA Provider sends final 'Project Complete' email** to grantee/contractor and submits project report to PCEF.