

# Mass Save Residential Coordinated Delivery Standard for Evaluations, Materials, Installation, and Conduct for Energy Efficiency Measures - Facilitated Services Contractors

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## 1. Program Description

The primary objective of the Mass Save Program (the Program) is to provide residential customers with energy efficiency recommendations that enable them to identify and initiate the process of installing cost-effective energy efficiency upgrades. The Mass Save Program makes it easy, clear, and compelling for customers to participate in all comprehensive energy efficiency programs by providing information through bold outreach mechanisms, incentives, and multiple financing options.

The Program promotes a house-as-a-system approach and focuses on the home's thermal envelope (shell insulation and air leakage conditions), mechanical systems (HVAC & DHW), and lighting and appliances to identify cost-effective energy efficiency improvement and/or replacement opportunities.

This systematic approach to home improvement that addresses all aspects of building systems requires clear standards to maximize energy savings and assure customer satisfaction. It is important to note that the Mass Save Standard for Evaluations, Materials, Installation, and Conduct (the Standards) is primarily focused on traditional weatherization materials and strategies. The Program Administrators ("PAs") view these Standards as a "living document" that will be updated periodically as the Program continues to evolve.

Lead Vendors ("LVs") are responsible for maintenance and enforcement of these Standards as directed by the PAs.

The Program will coordinate with other Massachusetts programs to develop consistent standards across programs as well as to assure consistent customer education and promotion of the house-as-a-system approach.

Future revisions of the Standards may include alternative/new technologies and approaches for new measures (e.g., spray foam in attics).

The PAs are supportive of more coordinated statewide training to ensure correct evaluation and installation techniques for the Program. It is expected that training requirements will increase over time for CONTRACTORS to retain their status as an authorized program CONTRACTOR. The goal is to have a sustainable and experienced workforce that is focused on achievable maximum energy savings ready and able to meet customer demand.

## 2. CONTRACTOR Qualifications and Responsibilities

The term "CONTRACTOR" as used in this document applies to any individual or company performing LEAD VENDOR assigned work that is being performed within the Mass Save program. This applies equally to vendors working directly for the PAs and to independent CONTRACTORS doing work for homeowners.

The purpose of these guidelines and associated information is to codify the requirements of Facilitated Services CONTRACTORS who participate in the

Mass Save Program. They are intended as *minimum* standards for participation in the program.

### 3. Licenses and Certifications

- a. CONTRACTORS must have all licenses and registrations required for their area of work. Appropriate documentation must be supplied to The Program upon request.
- b. CONTRACTORS must also obtain any certifications or other recognitions required by individual PAs or LVs.

### 4. Materials

- a. All materials supplied must meet applicable specifications.
- b. All materials must conform to catalog listing.
- c. Material substitutions are not allowed without written pre-approval by the LVs.
- d. CONTRACTORS will keep an SDS on the job site for every material used.

### 5. CONTRACTOR Onsite Standards

All Home Energy Services Program representatives to follow.

- a. Before Arriving on Site
  - i. Vehicle Identification Requirement - The company name should be included on all company vehicles.
  - ii. Provide confirmation to all customers before arriving on site. This could be an email, letter or phone call confirming the appointment.
- b. Lead Technician Requirements – Lead technician should be the first and last interactions with the customer while onsite.
  - i. The Lead Technician should introduce himself/herself to the customer showing some form of identification: business card, ID badge or other identification that associates the Lead Technician as the Mass Save Participating CONTRACTOR. The Lead Technician should also be providing an overview of the work or evaluation that is going to be performed and where they will be doing the work or evaluation.
  - ii. At the end of each day, the Lead Technician should conduct a walk-through of the home making sure the customer is satisfied with the cleanliness of the home and to review the work or evaluation completed. The Lead Technician should also provide a contact number for additional questions.
- c. General CONTRACTOR Crew Requirements
  - i. Smoking - CONTRACTOR should be out of direct sight of the customers. This could include smoking in the company vehicle, personal vehicle or across the street.
  - ii. All cigarette waste should be properly disposed of and removed from the property each day.
- d. Crew Clothing - Shirt and pants are required to always be worn while on site.
  - i. Shirt will not contain vulgar or offensive language/pictures.
  - ii. All clothing and general appearance should be representative of the high standards of the Mass Save Home Energy Services Program.

- e. Shoes
  - i. Always comply with OSHA requirements for footwear.
  - ii. Set customer's expectations for wearing footwear in the home, including:
  - iii. Wearing booties to eliminate tracking dirt into house when necessary.
  - iv. Properly protect travel areas from foot traffic.
- f. Ask the homeowner for permission before using the restroom facilities.
- g. The crew should not eat food in the customer's home. The crew may eat in the driveway/truck and should clean up after themselves.
- h. Phone usage inside the home should be limited to work-related calls only. Each company is responsible for maintaining their own employee requirements regarding phone use but should not interfere with their work or customer service.
- i. Each member of the crew is expected to refrain from any language or actions that could be construed as offensive, harassing, intimidating, and/or demeaning while at a customers' property.
- j. Customer/Condition of House
  - i. No trash will be left on property (neither inside nor outside home)
  - ii. Leave customer's property in the same condition as when the work started.
  - iii. No graffiti will be permitted on the customer's property at any time.
  - iv. Working Hours - Unless authorized by the customer, crews will work during normal business hours and all crews must follow all local ordinances.
- k. Customers should not be in the general area when work is being completed.
- l. Performance of Work
  - i. All labor to be performed in a workmanlike manner.
  - ii. All work must be performed in a lead-safe manner according to all State and/or Federal Requirements in force at the time of the work.
  - iii. All work must be performed in conformance with all applicable OSHA requirements and other governmental standards.
  - iv. All weatherization work must be performed in conformance with applicable BPI standards or other standards as identified by Mass Save.
  - v. All work must be performed in compliance with all applicable state and local codes.
  - vi. All measures installed must be in conformance with the Work Order.
  - vii. Pre-Approved written Change Orders by the LV or initial or sign-off of completion certificate by the homeowner are required before any modifications to the original Work Order are made.
  - viii. CONTRACTORS *should attempt* to make acceptable repairs for all accidental damage done to a customer's property at the CONTRACTOR's expense within 10 business days. Both the customer and the LV must be informed when damage occurs. The LV will make the final decision as to when acceptable repairs have been made.
  - ix. CONTRACTORS will treat homeowners and their property in a respectful and professional manner.
- m. Jobsite Cleanup
  - i. CONTRACTORS are responsible for the removal of all construction debris from the job site.
  - ii. CONTRACTORS are responsible for restoring every job site to its pre-work condition at project completion.

- n. CONTRACTORS are strongly urged to use drop cloths to protect homeowners' property/belongings.
- o. Documentation
  - i. CONTRACTOR Documentation must conform to the requirements detailed in their program participation agreement including, but not limited to:
    - 1. After Work Completion - CONTRACTORS must submit documentation (signed by customer and CONTRACTOR) that the approved Scope of Work is complete.
    - 2. The Completion document must include:
    - 3. An itemized confirmation that the Program Audit recommendations were addressed.
    - 4. An itemized list of each evaluation, measure, area, etc., installed.
    - 5. Proof of approved Change Orders by CUSTOMER or LV.

## 6. Communications

- a. CONTRACTOR Communications with CUSTOMER
  - i. CONTRACTORS will always be courteous to CUSTOMERS.
  - ii. CUSTOMERS and LV must be notified as soon as possible if an appointment must be rescheduled, according to the terms of the CONTRACTOR Participation Agreement.
  - iii. CONTRACTORS will clearly explain all work procedures, evaluations, and items to be installed to the CUSTOMERS home before and during the work process.
  - iv. CONTRACTORS will answer all CUSTOMER questions in an honest and straightforward manner. If the CONTRACTOR does not know the answer to a question, they will refer the CUSTOMER to LV for an answer.
  - v. CONTRACTOR will review with the CUSTOMER any CUSTOMER RELATED ACTIONS (CRAs) as listed on the signed contract prior to CONTRACTOR arrival to ensure workspace is prepared for Evaluation or Installation.
  - vi. CONTRACTORS will inform CUSTOMERS of any fragile items in the work area and request that the CUSTOMER move those items to a safe location prior to start of work.
  - vii. CONTRACTORS will ask CUSTOMERS for permission to use a household restroom.
  - viii. CONTRACTORS will keep CUSTOMERS informed regarding estimated daily arrival, break, and departure times.
  - ix. CONTRACTORS will document any problems and unusual situations as they occur and notify their LV.
- b. CONTRACTOR communications with Mass Save
  - i. CONTRACTORS will respond promptly and accurately to communications from Mass Save and LVs.
  - ii. CONTRACTORS will document problems and unusual situations and promptly report those to LVs.
  - iii. CONTRACTORS will respond promptly to address problems as they occur.
  - iv. CONTRACTORS will notify LV of any changes to staffing that affect authorization to work in the program (certifications, background checks etc.)
- c. CONTRACTOR Actions Requiring Mass Save Response
  - i. Theft

- ii. Theft may result in immediate cancellation or suspension as a Mass Save Approved CONTRACTOR and full legal remedies including but not limited to prosecution. Theft includes but is not limited to:
    - 1. Charging for materials not installed or labor not incurred.
    - 2. Inflating the actual cost for services provided.
    - 3. Misrepresenting work performed, completed or data provided to the LV or PA. Committing fraud.
    - 4. Unauthorized removal of CUSTOMER personal property.
- d. Other Unacceptable Actions
  - i. The following CONTRACTOR actions are examples that may result in immediate cancellation or suspension as a Mass Save Approved CONTRACTOR. This is not a complete list and is not limited to the items listed below. Additional training may be required before reinstatement as a Mass Save Approved CONTRACTOR.
  - ii. Charging clients for Program Eligible Services while job is open (one year period).
  - iii. Soliciting or performing work on a customer's home outside the scope or context of pre-weatherization work, for customers assigned to the CONTRACTOR.
  - iv. Providing false information to Mass Save, LV, or the CUSTOMER concerning work requirements.
  - v. Failure to correct job deficiencies.
  - vi. Use of inferior materials.
  - vii. Repeatedly missing timelines.
  - viii. Repeatedly performing work of poor quality.
  - ix. Leaving the customer's property in a potentially dangerous condition without written notification to the CUSTOMER immediately and LEAD VENDOR within 2 Business days of Evaluation or Installation completion.
- e. Building Permits
  - i. CONTRACTORS are required to obtain and to pay for all applicable permits, certificates of inspection, and license fees related to work performed through the Mass Save program.
- f. CONTRACTOR's Insurance
  - i. Provide insurance at the coverage amounts listed in the program participation agreements with respect to the work they perform within the Program.
  - ii. Maintain this insurance at their own expense and in full force and effect for the full term of the contract.
  - iii. List each Mass Save Program sponsor as "additionally insured" on insurance certificates.
  - iv. All policies shall be issued by companies authorized to write that type of insurance under the laws of the Commonwealth of Massachusetts.
  - v. CONTRACTORS shall provide minimum coverage with respect to the operations performed by any employee, SUBCONTRACTOR, or supplier, as detailed in program participation agreements.
- g. BACKGROUND CHECKS
  - i. CONTRACTORS must comply with all background check policies required by the individual PA for which the CONTRACTOR is approved to do work. CONTRACTORS must check with each LV on specific requirements.

## 7. Health and Safety

### a. Overview

- i. The health and safety of CUSTOMERS, PROGRAM staff and CONTRACTORS is of primary concern to the Mass Save Program. It is important that all personnel maintain a high level of awareness concerning the potential hazards associated with the weatherization process. The requirements set forth in this standard provide only general guidelines for health and safety concerns.
- ii. CONTRACTORS must familiarize themselves with all the health and safety issues associated with weatherization. More specific information concerning indoor air quality problems can be obtained through the U.S. Environmental Protection Agency (EPA) and the U.S. Consumer Product Safety Commission.
- iii. Detailed specifications regarding the health and safety of workers in the construction industry can be found in Construction Industry OSHA Safety and Health Standards (29 CFR 1926/1910) that is available from the U. S. Department of Labor.
- iv. The above standards are applicable to all CONTRACTORS, their employees, associated workers, and all SUB-CONTRACTORS providing services using funding under the Mass Save program.
- v. Each home weatherized under the Mass Save program must be individually assessed to determine the existence of potential hazards to CONTRACTORS or CUSTOMERS.
- vi. CONTRACTORS, their employees, associated workers, and all SUB-CONTRACTORS are required to take all reasonable precautions against performing work on homes that will subject occupants to health and safety risks. If unsafe conditions exist that would endanger the health or safety of the CUSTOMERS or weatherization CONTRACTOR, and those conditions cannot be corrected, no Mass Save work may be started on that home.
- vii. A Mass Save energy assessment must be completed prior to the CONTRACTOR'S work.
- viii. CONTRACTORS shall maintain a copy of their Health and Safety Policy and train all employees accordingly. They shall supply Material Safety Data Sheets (MSDS) for products and materials used by their crews and have these documents available on all jobsites.
- ix. Adherence to worker health and safety and applicable OSHA standard are required for all jobs performed by CONTRACTORS their employees, associated workers, and all SUB- CONTRACTORS.
- x. CONTRACTORS shall comply with all state and federal lead safe work policies and practices.
- xi. CONTRACTORS shall fully document and communicate to the LV all health/safety related problems and concerns that might inhibit the installation of specified measures to program standards or could result in injury or property damage.

## 8. Evaluation Guidelines

### a. Knob and Tube

- i. When the Home Energy Assessment reveals evidence of Knob & Tube wiring in a home, a secondary evaluation will be required by the Mass Save Program to be completed by a licensed professional.
- ii. The CONTRACTOR will evaluate the home for evidence of live Knob & Tube up to and including:
- iii. Using appropriate testing devices and methods as defined by local, state, and



- national code requirements.
  - iv. Removing and evaluating connections to receptacles, switches, circuit breakers, fuses, connections, or other customer accessible devices for controlling electricity.
  - v. All visible wiring.
  - vi. Removal and replacement of accessible fiberglass batting from evaluation areas.
  - vii. Removal and replacement of any accessible blown in insulation from evaluation areas.
  - viii. The CONTRACTOR will specifically review any areas identified on the Barrier Clearing Form (BCF) and provide results of their testing by marking these areas as “Live” or “Not Live”.
  - ix. If the evaluation cannot be completed due to incomplete CRAs or previously unidentified barriers to work completion, CONTRACTOR must contact the LV within 2 business days.
- b. Recessed Lights for Insulation Contact
- i. When a Home Energy Assessment reveals recessed lights that penetrate an area to be insulated in a home, a secondary evaluation may be required by the Mass Save Program to be completed by a licensed professional.
  - ii. The CONTRACTOR will evaluate the home to determine if the identified recessed lights meet the appropriate requirement to be in direct contact with insulation according to local, state, and national code.
  - iii. If only certain lights meet the appropriate requirement the CONTRACTOR will specifically identify which recessed lights meet the requirement by utilizing the “Notes” field on the BCF.
  - iv. If the evaluation cannot be completed due to incomplete CRAs or previously unidentified barriers to work completion, CONTRACTOR must contact the LV within 2 business days.
- c. Combustion Safety Test Failure
- i. When a Home Energy Assessment reveals a failed Combustion Safety Test in a home according to Program Standards (i.e. low draft, high ambient CO, high operational CO), a secondary evaluation will be required by the Mass Save Program to be completed by a licensed professional.
  - ii. The CONTRACTOR will perform a standard “service call” or “preventative maintenance call” and attempt to rectify the issue identified during the Home Energy Assessment to Program Standards.
  - iii. The CONTRACTOR will identify on the BCF the results of final testing once the work has been completed.
  - iv. If the evaluation cannot be completed due to incomplete CRAs or previously unidentified barriers to work completion, CONTRACTOR must contact the LV within 2 business days.
- d. Previously Unidentified Safety Concerns
- i. If the CONTRACTOR identifies areas of concern for insulation or air sealing work to be completed, that are in their area of licensure, the CONTRACTOR is required to notify the LV of these areas by utilizing the “Notes” field on the BCF.
  - ii. These areas of concern include but are not limited to.
    - 1. Open electrical junction boxes
    - 2. Exposed wiring

## 9. Materials and Installation Guidelines

- a. All Instant Savings Measures (ISMs) shall be installed according to manufacturers' instructions, the standards in this section, and follow Massachusetts Building Code, (780 CMR), Massachusetts Wiring Code (527 CMR), NFPA 70, 2020 Edition, and all other appropriate codes.
- b. Line Voltage/ Low Voltage Thermostats
  - i. CONTRACTORS shall install code compliant Line Voltage / Low Voltage capable thermostats that meet the following minimum requirements;
  - ii. 7- day programmable.
- c. CONTRACTOR shall provide education and manufacturers documentation to the CUSTOMER on thermostat functions including but not limited to.
  - i. ON/OFF Function
  - ii. Programming of the 7-day schedule feature
  - iii. Manual temperature setting
- d. CONTRACTOR will take and provide to the LV the following Photos
  - i. UPC of the device installed.
  - ii. Photo of each Thermostat installed taken in a manner where the LV can easily identify its' location inside the home.

## 10. CONTRACTOR Performance Standards

- a. Time to Serve
  - i. Upon receiving notification of a project assignment, the CONTRACTOR will accept or decline a project within 2 BUSINESS DAYS
  - ii. Upon Acceptance of a project the CONTRACTOR will attempt to schedule the evaluation or installation a minimum of 3 times within the next 5 BUSINESS DAYS
  - iii. The CONTRACTOR will notify the LV if they are unable to connect with the customer through the appropriate system.
  - iv. The CONTRACTOR will schedule the evaluation or installation to be completed within 5 to 10 BUSINESS DAYS of project acceptance. (as the CUSTOMER's and CONTRACTOR's schedule allow)
  - v. Upon completion of the evaluation or installation, the CONTRACTOR shall submit all appropriate documentation to the LV within 2 BUSINESS DAYS. Documentation includes but is not limited to.
    1. Dual signed Certificate of Completion
    2. CONTRACTOR Invoice
    3. Signed and completed BCF (Evaluations only)
    4. Permit (Thermostat installation only)
    5. Photos of completed work (if applicable)

## 11. Quality Assurance

- a. The program has the goal of performing quality assurance evaluations where pre-weatherization barrier work and ISMs have been installed by the CONTRACTOR. Any issue identified during this evaluation will need to be successfully addressed prior to release of CONTRACTOR payment.
- b. CONTRACTOR Evaluation
  - i. CONTRACTORS will be evaluated on an ongoing basis throughout the Program

Year based on work quality, time to serve, customer service, and quality of program documentation.

- ii. CONTRACTORS who repeatedly fail to meet timelines, generate an undue number of CUSTOMER complaints, and fail to adequately fulfill program obligations are eligible for suspension and/or termination.

## 12. Program Sponsors

Berkshire Gas  
Cape Light Compact  
Eversource  
Liberty Utilities  
National Grid  
Until

## 13. Reference

Massachusetts 527 CMR  
Massachusetts 780 CMR  
NFPA 70, 2020 Edition  
Industry OSHA Safety and Health Standards (29 CFR 1926/1910  
U.S. Environmental Protection Agency (EPA) – Indoor Air Quality  
U.S. Consumer Product Safety Commission – Indoor Air Quality