

EXHIBIT D Contractor Requirements

I. EXPERIENCE

The Contractor shall demonstrate a minimum of five (5) years of experience in the commercial mechanical temperature control business by submitting copies of state and local licenses and certificates. The Contractor shall have no unresolved claims with the Better Business Bureau (BBB).

II. LICENSING

The Contractor shall be fully licensed, as applicable, and with a minimum of a C-20 license. Contractors must be insured to do business at SCE customer's sites, in order to provide complete service.

III. PERMITS

Contractor shall comply with any and all required License or Code requirements and obtain all necessary or advisable permits.

IV. INSURANCE REQUIREMENTS

Contractor must meet all insurance requirements specified in this Agreement.

V. PREVENTIVE MAINTENANCE SCHEDULING

The Contractor shall schedule preventive maintenance tasks using a computer software program to assure a uniform and detailed method of scheduling work.

VI. ENGINEERING SUPPORT

The Contractor is required to employ at least one (1) full time professional who has an engineering degree or at least 10 years of experience in the field of refrigeration, boilers, and pneumatic, electric, and electronic controls.

VII. TECHNICIAN REQUIREMENTS

The Contractor shall employ a minimum of three (3) full-time, Level 2 HVAC service technicians. A maximum of five (5) Qualified HVAC technicians per Contractor may be enrolled in the Program. Enrollment and training of additional technicians will require pre-approval by SCE and/or CLEAResult (please contact the Program for pre-approval). The service technicians assigned to maintain mechanical systems under the Program must meet the following requirements:

- a. Technician requirements for Level 2 Fully Qualified Technicians. Full service technicians assigned to maintain mechanical systems under the Program must meet the following requirements:
 - i. A minimum of five (5) years Heating, Ventilation & Air Conditioning service experience; and
 - ii. Hold a valid Refrigerant Transition and Recovery Certification, Type II or Universal, as required by 40 CFR Part 82, Subpart F of Section 608 of the Clean Air Act of 1990. Valid 608 technician certifications must be issued under a Program approved by the U.S. Environmental Protection Agency; and
 - iii. Hold appropriate certification from recognized industry certification bodies.
 - A. Recognized providers shall include those with ANSI 17024 recognition providing commercial HVACR certification that is highly related to HVAC service and system maintenance. At a minimum, the certification credential must include refrigerant cycle fundamentals, troubleshooting and optimization, electrical fundamentals, troubleshooting and optimization and air side fundamentals, troubleshooting and optimization focused on commercial HVAC systems.
 - B. Credentials that are currently accepted include: (UA HVACR S.T.A.R. – HVACR Service and/or Mastery) (NATE Heat Pump Service, Air Conditioning Service or HVAC Efficiency Analyst or Air Distribution Service or Air Distribution Installation), (HVAC Excellence Light Commercial, Air Conditioning, Heat Pump Service or Master Specialist Certification), (RSES CM, CMS in any designation with CM, or SM in only Commercial Air Conditioning, or Heat Pump without a CM), (Journeymen- HVAC Mechanic)

- C. If a technician does not meet requirement iii, but has another form of industry certification, the Program will consider those individuals on a case-by-case basis.
- b. Technician requirements for Level 1 Less-Qualified Technicians. Technicians assigned to assist fully-qualified technicians in maintaining mechanical systems under the Program must meet the following requirements:
 - i. Be currently employed by the contractor
 - ii. Have a minimum of twelve (12) months experience in the HVAC industry field
 - iii. Hold an active EPA Card
 - iv. Work under the direct supervision of a Level 2 Program-certified technician
 - v. Submit a signed Level 1 Technician Application documenting their sincere commitment to continued HVAC education
 - vi. Be currently involved in an approved HVAC education program with the commitment of becoming a fully-certified technician.
 - A. Approved HVAC education programs include:
 - i. www.itsaboutq.net: a program sponsored by SCE that will provide an opportunity for technicians to add to advance their HVAC knowledge and expertise, and learn more about professional development and career advancement opportunities.
 - ii. Registered Apprenticeship Program
 - iii. IHACI NATE Certification Training Series
 - iv. Accredited Trade/Career Tech Training Programs
 - B. If a technician is not enrolled in one of the 4 programs listed above but is enrolled in another HVAC education Program, the SCE HVAC Optimization Program will consider those individuals on a case-by- case basis.
- c. Roles for Level 1 Less-Qualified Technicians. Level 1 Technicians will only perform work related to the SCE HVAC Optimization Program while under the direct supervision of a mentor that is a Program-approved.
 - i. Level 1 Technicians will have a MPS login with limited privileges and visibility.
 - ii. The certified technician with the MPS login is responsible for all work completed on any HVAC systems under their supervision. All accountability falls on the Program-qualified technician onsite.
 - iii. We will allow no more than two (2) Level 1 Technicians to work under one (1) Level 2 Technician. This 2:1 ratio is designed to ensure quality work, while also creating an environment conducive to training and workforce development.
- d. Technician Documentation Verification: SCE HVAC Optimization will verify and document all submitted certifications. Additionally, any questions or uncertainties that arise regarding technician certifications or qualifications are to be discussed with the SCE Program Manager for approval.

VIII. EMERGENCY SERVICE

Every activity performed under this agreement is designed to minimize the incidence of emergency situations; however, backup emergency service will be provided by the Contractor to minimize downtime and inconvenience. The terms and conditions of Emergency Service shall be set forth in the Maintenance Agreement between Contractor and Customer, the form of which shall be reviewed and approved by CLEARResult.

IX. CONTRACTOR PRE-ASSESSMENT TEST

Contractor applicants must take and pass an online exam about the content of ANSI/ASHRAE/ACCA Standard 180-2008 as a requirement for Program enrollment. The Contractor shall purchase a copy of the ANSI/ASHRAE/ACCA Standard 180-2008 for review and prepare for this open-book exam.