

Premium Efficiency Cooling Program

Commercial HVAC Tune-up/Quality Maintenance

2018 Contractor Training Requirements



General Contractor Qualifications

A. Experience

The Contractor shall demonstrate a minimum of (5) years' experience in the commercial mechanical temperature control business by attaching copies of state and local licenses and certificates.

B. Technical Requirements

(i) The Contractor shall employ minimum of (1) full time, HVAC service technicians. The service technicians assigned to the Program are listed in the table below and must meet the following requirements:

1. A minimum of 2 years Heating, Ventilation & Air Conditioning service experience.
2. An HVAC Technician Certificate from an accredited HVAC vocational training program or school, and/or appropriate certification from a recognized industry certification body (e.g. UA STAR, NATE, HVAC Excellence, RSES, NCI, NEBB, TABB, BPI, IHACI, IAQ).
3. Compliance with any and all applicable required License or Code requirements.
4. Mechanical service technicians will hold a Universal EPA license, Refrigerant Transition and Recovery Certification, Class II or Universal, as required by 40 CFR Part 82, Subpart F, and a current certification issued under a program approved by the U.S. Environmental Protection Agency.
5. Complete Program training offered by Implementer.
6. The Qualified Technicians assigned to maintain mechanical systems will have all necessary certifications and qualifications to provide HVAC Services on the Qualified Unit subject to the Qualified Customer Service Agreement.
7. The Program will review the qualifications of Technicians who have more than 5 years HVAC service experience but lack an HVAC Technician Certificate from an accredited HVAC vocational training program or school or Appropriate certification from a recognized industry certification body (Item 2) or a Universal EPA license, et al (Item 4) on a case by case basis to determine eligibility. Alternatives for partial qualifiers to achieve qualification may include the Technician's participation in additional, industry-recognized training courses and/or verification of the Technician's experience/skill level by the Implementer through on-site job shadowing. The necessary steps will be subject to the Implementer's discretion.

(ii) The Qualified Technicians assigned to maintain mechanical systems will be qualified to service the equipment type under contract as well as all associated pneumatic, electric, and electronic controls.

Contractor shall submit a complete list of Technician vocational, apprenticeship and on-the-job training and certifications using the Technician Verification Form.

Contractor Training Overview

The following table provides an overview of the training sessions offered by the Program

| Course Title & Description | Contractor Attendees | Approx. Duration | Delivery Method | Timing | Prerequisites |
|--|--|------------------|---|--|--|
| Sales Training: <ul style="list-style-type: none"> • Overview of program and Standard 180-based services; what they are and how they differ from typical HVAC service • Value proposition for contractor and customer • Sales Cycle • Marketing support and strategy | Sales Staff | 1 hour | Contractor office, if suitable; CLEAResult office; or Webinar | Within 2 weeks of Contractor eligibility and enrollment confirmed. | ✓ Approved Contractor Participation Agreement |
| Operations Training <ul style="list-style-type: none"> • Administrative requirements to qualify for incentives • Program Documentation • Incentive Payment Process and Timelines • Scheduling: expected time to complete maintenance | Operational Staff | 1 hour | | | |
| Initial Technician Training <ul style="list-style-type: none"> • CLEAResult Introduction • Program Objectives • Overview of Standard 180 and Program Requirements. • Review of Program Expectations and Inspection Process • Review of Acceptable and Unacceptable Workmanship | Eligible technicians (Rooftop training can accommodate no more than 4 technicians per trainer) | 3-4 hrs | Classroom (contractor office, if suitable or CLEAResult office) | After contractor completes Sales and Operations Training | ✓ Approved Customer Reservation |
| Rooftop Technician Training <ul style="list-style-type: none"> • Practice using skills and tools required to complete the inventory, inspection, and maintenance in Standard 180. • Practice with VSP Tools | Eligible technicians (Rooftop training can accommodate no more than 4 technicians per trainer) VSP Representative | 6-8 hrs | Rooftop | After technicians complete classroom training | ✓ Approved Customer Reservation ✓ Technicians completed classroom training ✓ The Technician brings the VSP Toolkit for the rooftop portion |

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| <p>Side by Side Follow-up Technician Observation:</p> <ul style="list-style-type: none"> Skills Test: proficiency in Standard 180 inspection method and satisfactory completion of program measures. | <p>Technicians who have completed Initial Technical Training</p> | <p>3-4 hours</p> | <p>Customer Site</p> | <p>Within 2-4 weeks after completing initial technical training</p> | <p>✓ Technicians must have completed the Initial Technical Training</p> |
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The training location(s) will be defined between Contractor and CLEAResult. The Contractor must be able to provide access to an eligible Unit equipped with a functional economizer for the technician training.

Technicians who successfully complete the training and demonstrate competency in performing the work will be approved for participation in the Program. Technicians who do not demonstrate proficiency may receive support coaching and additional training as determined by CLEAResult.