TRADE ALLY TRAINING

PUD Window Installer & Sales Training

October 7, 2014
Training Agenda

- Introduction
- Program Overview
- Paperwork
- Quality Control
- Specifications
- PUD Resources and Contacts
Why PUD invests in Energy Efficiency

- Helps customers lower their bills
- State law mandates targets
- PUD Goal – 1st resource of choice

Energy Efficiency
Residential Sector Efficiency Potential

- Electric Homes, 51%
- Natural Gas Homes, 38%
- Other Fuel Homes, 11%
Annual Residential Potential by End Use

- Cooling
- Envelope New
- Appliances
- Consumer Electronics
- Water Heat
- Envelope Retro
- HP / DHP
- Lighting
Program Overview
2013 - Completed Projects

- Glass: 459
- Ceilings: 187
- Floor: 202
- Walls: 44
- Ducts: 559
- HP-Air: 401
- HP-Geo: 5
- DHP: 578
Your Role

- **Influence and educate customers** about energy efficiency, PUD programs and their benefits

- **Bid jobs:**
  - Use PUD bid forms
  - Review customer owned balances
  - Explain *when insulation is required*

- **Install measures** as authorized and according to specifications

- Handle **customer service** and maintenance issues
Understanding Eligibility

- Must have an active PUD account
  - (Snohomish County or Camano Island)
- Permanently Installed Electric Heat in Existing Structures
- Weatherization Work may be Required
- Obtain Jurisdictional Required Permits
- No work in non-living areas of the home, even if heated
- Not a remodel program
Multi-Family Program Requirements
on hold, but accepting applications for 2015

- 3 or more attached units up to 3 stories
- Must be electrically heated (covers common areas & units)
- Specific Multi-Family application
- Individual bids required for each building
## Incentives

### Single Family

<table>
<thead>
<tr>
<th>Eligible Measure</th>
<th>Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP to DP (u ≤ 0.30)</td>
<td>$6/sq ft</td>
</tr>
<tr>
<td>DP to DP</td>
<td></td>
</tr>
<tr>
<td>Metal to Vinyl (u ≤ 0.30)</td>
<td></td>
</tr>
</tbody>
</table>

### Multi-Family

*On hold, but accepting applications for 2015*

<table>
<thead>
<tr>
<th>Eligible Measure</th>
<th>Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP to DP (u ≤ 0.30)</td>
<td>$8/sq ft</td>
</tr>
<tr>
<td>DP to DP</td>
<td></td>
</tr>
<tr>
<td>Metal to Vinyl (u ≤ 0.30)</td>
<td>$6/sq ft</td>
</tr>
</tbody>
</table>

*Note: Programs and incentives subject to change. Always check [www.snopud.com/weatherization](http://www.snopud.com/weatherization) for current offerings.*
Paperwork
For Homeowners

- Program guidelines
- Incentive amounts
- Financing links
- Testimonials, podcasts, educational materials
- Easy access to necessary forms

www.snopud.com/weatherization
How to Participate

Forms & Process Info for Homeowners

- Participation Application & Agreement
- DHP Rebate Application
- Links to Contractor Lists
Submitting Complete Application

- Signed & Dated
  - Customer Bid Sheets
  - Sign and date second page

- Should be submitted by homeowner

- INCLUDE ALL DOCUMENTS TO PREVENT DELAYS
Uniform Bid Sheets

- Bids are good for a **minimum** of 60 days
- Bid sheets are available:
  - Online
  - Editable PDF’s
- Contractor & customer must sign/date bid sheet
- When submitting electronically **DON’T FORGET** to check electronic submittal box
Submitting Paperwork

✉ Email
   ✉ CE@snopud.com
       • BE SURE TO CHECK ELECTRONIC SIGNATURE BOX

✉ Fax
   ✉ 425-267-6762

✉ Mail
   ✉ Community Energy MS E2 PO Box 1107 Everett WA 98206

When submitting via email or fax DO NOT MAIL. Only submit via one method to avoid duplicate efforts.
Application Status

**FIRST** check with your customer to see if they submitted their application with your bid.

Then, to check if an application has been received and/or authorized:

- **CE@SnoPUD.com**

For applications that have been assigned to an inspector contact the designated inspector:

- Jay Snyder 425-783-1721
  jasnyder@snopud.com
- Aaron Stewart 425-783-1726
  apstewart@snopud.com
- Ed Walstad 425-783-8158
  edwalstad@snopud.com
The Energy Services Authorization (ESA) is your approval to start work.
The Energy Services Authorization

- When work is complete, remember to **sign and date** the Contractor box.
- Then return signed ESA form to the PUD at CE@snopud.com
Quality Control
Warranty Requirements

- 2-year minimum all inclusive labor and materials required (101.040)
- 10-year minimum on all glass (101.040)
- Leave warranty information with homeowner
# Inspection Schedule

<table>
<thead>
<tr>
<th>Eligible Measure</th>
<th>Inspection Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glass Metal Frame to DP vinyl ((u&lt;=.30))</td>
<td>Bid Verification</td>
</tr>
<tr>
<td></td>
<td>Post Inspection</td>
</tr>
</tbody>
</table>
# Inspections: MD’s & Remedials

<table>
<thead>
<tr>
<th>Minor Deficiencies</th>
<th>Remedials</th>
</tr>
</thead>
<tbody>
<tr>
<td>➤ Not paid until fixed</td>
<td>➤ Health &amp; Safety related</td>
</tr>
<tr>
<td>➤ Not Health/Safety related</td>
<td>➤ Excessive amount of MD’s</td>
</tr>
<tr>
<td>➤ Limited work needed</td>
<td></td>
</tr>
</tbody>
</table>

Must be completed within 30 days.
Penalty: Suspension
Performance Monitoring

Requirements

- Pass Rate: 80% over past 6 months
- Jobs: Complete within 3 months (or request Extension)
- Minors/Remedials: Complete within 30 days
- Insurance & License Renewals: Submit before expiry
- Written Complaints: Not to exceed 1 in any 12 month period

*See Residential Installer Monitoring, Suspension & Delisting Procedures for full details.
Performance Monitoring

**Automatic 30-day Suspension**
- Job not completed within 3 months (without filing for extension)
- Minor/remedial not completed within 30 days
- Insurance/License expiry

**During Suspension**
- New bids will not be accepted
- ESA’s will not be issued
- Name will be removed from customer-facing lists

*See Residential Installer Monitoring, Suspension & Delisting Procedures for full details.*
Performance Monitoring

**Delisting**

- Multiple Suspensions
- Extended sub-80% pass rate
- Less than 4 jobs in past 12 months
- 2 written customer complaints in past 12 months
- Program violations or unlawful activities

**After Delisting**

- Two to five years before reinstatement

*See Residential Installer Monitoring, Suspension & Delisting Procedures for full details.*
Window Specifications
Window Installation
Measuring Windows
Angle Windows
Windows

✦ Non-Tested Windows {warm edge spacer, argon, LowE, ½” Air Space} \((102.145.2)\)

✦ Framed Units NFRC Rated \{U-Value .30 or lower\} \((102.155.3)\)

✦ Interlock \((102.205)\)

✦ Locks/Latches \((102.215, .230)\)

✦ Free Fall \((102.220, .225)\)
Windows

- Screens (102.235)
- Anti-Lift Blocks
- Weep Holes
Skylights

- LowE, Argon, Warm Edge Spacer, NFRC Rated {best possible double pane} (102.400.2)
- Ventilating Skylights Only if Existing (102.450)
General Installation Requirements

- Repairs Not Covered (102.510)
- Stucco Bar Styles {where allowed} (102.522)
- Damage Responsibility (102.523)
  - Contractor responsible for damages that occur during installation
Safety Glass

Basic zone for sidelites: within 24 in. radius of door edge in closed position & <60 in. above walking surface

Exempt if a 3 in. sphere cannot pass

Sidelite exempt when perpendicular to door & on latch side

Safety glass when walk-through hazard exists: all four of (1) >9 sq. ft., (2) lower edge <18 in. above walking surface, (3) upper edge >36 in. above walking surface & (4) within 36 in. horizontal of walking surface
Safety Glass

Rules (102.530)

- Within 2 foot arc of ANY door in the closed position
- May need both vent & fixed depending on direction of opening
Safety Glass

Rules (102.530)
Safety Glass
**Safety Glass code requirements**

**Observation**

- Window A + C same size and height off floor.
- Window D + F same size, different heights.
- Window E + F are same height off floor (less than 18”).
- Glass B + G are same size, < 9 sq. ft. & more then 18” off floor.
- Window A + H are same size and same height off floor.
- Windows H + I are both in tub area.
- Window J + L are same size & less then 24” from door.
- Window M + N + O same size. Window M higher off floor.
- Window K + N + O are same size & height off floor.
- Window M + H + I are both in tub area.
- Window M + H + I are both in tub area.
- Window M + H + I are both in tub area.
- Window M + H + I are both in tub area.

**Difference between both**

- Window A not required to be safety glass, Window C required.
- Window D not required to be safety glass, Window F required.
- Window E not required to be safety glass, Window F required.
- Window I not required to be safety glass, Window H required.
- Window L not required to be safety glass, Window L required.
- Window O not required to be safety glass, Window N required.
- Window M not required to be safety glass, Window M + N required.

**Reason for safety glass**

- Within 24” from exterior door.
- Combination of > then 9 sq. ft. and less then 18” off floor.
- Combination of > then 9 sq. ft. and less then 18” off floor.
- Combination of within 24” radius with no permanent barrier.
- Within 60” floor landing (horizontal).
- Within 60” floor landing of steps.
- Only Lower sash required to be safety glass.

**Key**

- >= greater than
- <= Less than
Flashing & Support Screws

- Overhangs & Flashing (102.615)
  - Must be continuous
  - No less than ¼” overhang

- Types of Screws (Pan Head) (102.620)
  - Vertical edge for support
Head Flashing Needed
Liner Cutbacks and Overhangs

- Covering of Support Screws (102.621)
- Placement of Screws (102.635)
- Window Overhang 1” max (101.645)
Caulking Requirements

- Lap Siding Trim
- Wood Stopped Install (106.622)
Caulking
Improper Caulking and Cutting

- Caulking (102.648, .650)
Improper Caulking and Cutting

Caulking (102.648, .650)
Garden Window
Stucco Installations

- Stucco Requirements (102.652)
- Nails & Coverage (102.657)
Installation with Nail Flange Intact

- Caulk Behind Flange *(102.665)*
- Build Out Material *(102.670)*
  - Material shall be one piece & shall fill entire cavity
- Flange Left Exposed {mobile} *(102.672)*
- Caulking *(102.675, .680)*
  - Gaps of ¼” or greater will be filled with non-expanding foam or backer rod
Window with Flange & Trim

03/23/2011

LEARN ~ CONNECT ~ SAVE
Clean All Glass {stickers} (102.697)
Sliding Glass Doors

- .30 or better required (103.205.4)

- Center mullion must interlock in closed position

- Solid Threshold Support (103.307)
  - Any Wood Treated or Cedar (103.310)

- Screen must have latch and catch installed
Sliding Glass Doors

- 4 screws per vertical edge, handle screws do not count
PUD Resources & Contact Information
www.snopud.com/TradeAllies

>>Information for Weatherization & Heating contractors

- Bookmark or save to your “favorites”
- Get the latest program documents & reference materials here:

<table>
<thead>
<tr>
<th>Logo guidelines</th>
<th>This PPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bid Forms</td>
<td>Training PPTs</td>
</tr>
<tr>
<td>Contractor Agreement</td>
<td>Orientation PPT</td>
</tr>
<tr>
<td>Monitoring Procedures</td>
<td>Newsletters</td>
</tr>
<tr>
<td>Financing Options</td>
<td>Bulletins</td>
</tr>
</tbody>
</table>
Trade Allies: Weatherization & Heating

Thank you for your interest in becoming a PUD Registered Contractor. Information about our conservation programs and the forms you need to complete to become a PUD Registered Contractor are available here. To get started, you first need to complete, initial each page, sign and return the Energy Efficiency Contractor Agreement (see documents below). Contractors submitting a completed Energy Efficiency Contractor Agreement will automatically be placed on our contact list for the next orientation meeting. Orientations are held twice a year in the spring and fall.

For more information, please click on the link below for "New Weatherization/Heat Pump Contractors."

Weatherization & Heating Documents

- New Weatherization/Heat Pump Contractors
- Energy Conservation Participation Application & Agreement** (2180)
- Energy Efficiency Contractor Agreement
- Installer Performance Monitoring
- Balance Point & Heat Loss Forms
- Heat Pump Start-up Checklist** (2037)
- Heat Pump Bid Form** (2182)
- Insulation Bid Form** (2187)
- Window Installation Bid Form (2160)
- W-9 IRS Form
- Weatherization Specifications

Related Documents

- PUD Logo Guidelines for Trade Allies
- Trade Ally Newsletter
- Trade Ally Newsletter Issue 2, August 2012
- Trade Ally Newsletter Issue 1, July 2012

Weatherization & Heating

- Bulletin Update - 6/7/13
- Program changes effective 8/1/13
- New Trade Ally Orientation October 2013
- Heat Pump Installer & Sales Training October 2013
- Insulation Installer & Sales Training October 2013
- Window Installer & Sales Training October 2013

Program Details

- View details of this program
- View financing options for customers

Jump To...

- Financing Options for Customers
- PUD Electrical Service Requirements Manual
- Construction Handbooks & Forms
Marketing Support

What you can do

- Use the Registered Contractor logo
- Leverage program promotions & tools
  - Online, Bill Inserts, Advertising, Website, Events
  - EnergyAdvisor online audit, calculators
- Regularly check your online directory listing
  - description, contact info
- Make sure we have the right contact info for you
  - “Generic” email recommended

LEARN ~ CONNECT ~ SAVE
Registered Contractor Logo

- All use must be **pre-approved**
- Logo must be **unaltered**
- [www.snopud.com/tradeallies](http://www.snopud.com/tradeallies) for specifications & guidelines
- For use on print materials and website
- **Cannot be used in context** of
  “We are the...
  - #1 PUD Installer
  - best PUD Installer
  - most experienced PUD installer…”

Cathy Anderson
425-783-1798
cjanderson@snopud.com
Contact Info

Program Managers

✦ Kevin Watier 425-783-1714 kjwatier@snopud.com
✦ Cathy Anderson 425-783-1798 cjanderson@snopud.com

Inspectors

✦ Jay Snyder 425-783-1721 cell 425-239-1053 jasnyder@snopud.com
✦ Aaron Stewart 425-783-1726 cell 425-315-6185 apstewart@snopud.com
✦ Ed Walstad 425-783-8158 cell 425-231-2797 edwalstad@snopud.com
Contact Info

✦ PRIMARY Email
  CE@snopud.com

✦ Office Support Staff
  ✦ Carolyn Beebe
  ✦ Kim Wilcox
  ✦ Andrea Duffy

✦ Fax
  425-267-6762

✦ Energy Hotline
  425-783-1700
  Hotline Specialist Mordecai Cooke

✦ Mailing Address
  Residential Programs
  PO BOX 1107 MS E2
  Everett, WA 98206-1107
Thank You...

for helping PUD customers...