

Exhibit B

Scope of Work

REBATE PROGRAM STATEMENT OF WORK

BACKGROUND AND OVERVIEW

Boulder County manages approximately \$500,000 to \$1,500,000 annually in rebate funds and contracts with Cypress LTD (also known as the “Contractor”) to issue checks to each applicant. Boulder County will electronically submit rebate applications to the Contractor. The Contractor will review the application and all supporting documents for accuracy and submits weekly invoices to Boulder County for payment. Boulder County pays the weekly Contractor invoices allowing the Contractor to issue the checks to each approved recipient. The Contractor is responsible for issuing rebate checks to the applicant bearing the logo(s) provided by Boulder County. The Contractor also issues monthly invoices to Boulder County to cover processing and other fees. All collected data will be stored in a central database, provided by the Contractor, and accessible to the Boulder County and its partners with raw data being provided to Boulder County for integration into its data management system on a monthly basis consistent with the Contractor’s invoices.

The overall task of the Contractor is to support the deployment of rebate awards within the rebate program. The scope of work for the Contractor includes:

- 1) Verification of rebate reservations and applications, including assurance that equipment and technologies meet eligibility requirements for rebated measures;
- 2) Check writing services; and,
- 3) Management and reporting of required metrics and raw data in a prescribed format to Boulder County.

SCOPE OF WORK

1. Rebate Reservation/Application Verification and Check Processing

The Contractor will verify that each individual rebate meets Boulder County’s eligibility criteria. This will include the same fee for reservation processing if the reservation is cancelled and no application is completed. There will be no extra charge if the reservation is completed as an application.

Boulder County will submit reservations and applications to the Contractor. Required data will be as follows:

- Business or resident address and contact information
- Property owner address and contact information
- Rebate applicant’s contractor information
- Parcel ID number
- Utility account(s) information

- Energy efficiency measures implemented
- Square footage

Boulder County will attach supporting documentation, including:

- Itemized equipment and labor invoice(s)
- Accurate equipment model numbers or other relevant information necessary to look up specification sheets and verify rebate eligibility
- Program terms and conditions with rebate payee information

The Contractor will review each rebate reservation and application submitted within one week after the request is submitted to ensure that all required information is collected and accurate. To meet these requirements, the Contractor will:

- 1) Confirm the applicant has met the Terms and Conditions of the rebate program
- 2) Verify that the energy efficiency measures to be rebated meet the eligibility requirements.
- 3) Ensure that all required data has been submitted and that data entry parameters (e.g., set number ranges, utility account number formats, email addresses) are met. Any data that does not meet the defined criteria must be flagged. Boulder County must be made aware of the issues.
- 4) Confirm that equipment counts detailed on the rebate reservation and application match those listed on the applicant's contractor and vendor invoices.
- 5) Review and verify documentation such as contractor and vendor invoices, cut sheets and other technical documents to ensure that the equipment being installed - and in some cases, the original equipment that is being replaced – meets the eligibility requirements set forth by Boulder County. This may include, but not be limited to;
 - a. Reviewing minimum efficiency standards as applicable to equipment type, such as; the ENERGY STAR list of certified products, the Design Light Consortium's qualified products list, and AHRI's (Air Conditioning, Heating and Refrigeration Institute) Directory of Certified Product Performance
 - b. Comparing equipment specifications against minimum standards, such as those listed above and ASHRAE standards
 - c. Calculating potential energy savings
- 6) Record all correspondence and interactions with applicants and/or the applicants' contractors for the purpose of clarifying information or documentation submitted as part of the application.

The Contractor will notify Boulder County if a rebate reservation or application is denied in part or in whole. Boulder County will work with the applicant to correct issues when possible or notify the applicant with the reason(s) for the denial.

2. Check Writing Services

The Contractor will issue a weekly invoice to Boulder County for all:

- a. Approved rebate applications: A rebate application will be considered complete once the Contractor has received all required information and supporting documentation necessary to assure eligibility. The Contractor will notify Boulder County within one

week of application submittal if additional information or documentation is required to process the rebate.

- b. Rebate requests without eligibility verification: Boulder County may not require rebate eligibility verification on some rebates where Boulder County staff have already verified the rebate eligibility criteria have been met. Boulder County will identify which rebates should be processed in this manner.

Upon receipt of funds from Boulder County, Cypress will issue rebate checks to each applicant. Rebate checks will bear the logo(s) provided by Boulder County. Applicants should receive a rebate check within eight weeks of the submission of a completed, approved rebate application.

The Contractor will track and be able to report the date upon which:

- Completed rebate application was submitted.
- Rebate check was sent to applicant.
- Rebate check was cashed.

If any checks are returned by the post office as undeliverable, or if any checks remain uncashed by a business 90 days after issuance by the Contractor, the Contractor will notify Boulder County. Boulder County will contact the business to determine if they have received the check, if the mailing address is correct and then provide Contractor with any correcting information.

For returned mail, Contractor shall apply the corrected address and mail the check to the corrected address. Should the check need to be reissued, Contractor shall void the check with the Contractor's bank and reissue the check. Any fees associated with voiding and reissuing the check (including stationary and postage) shall be added to Contractor's next invoice.

If any checks remain uncashed by a business 180 days after issuance by the Contractor, the Contractor will notify Boulder County, void the check, and credit Boulder County on the next invoice. The Contractor shall return any remaining invoice credits, less cost of voiding the check, to Boulder County upon termination of this contract.

In the event a check is cashed during the process of voiding and/or reissuance of a replacement check, Boulder County shall reimburse Contractor any costs and fees incurred and Contractor shall add these costs that are in excess of the funding for the rebate to the Contractor's next invoice.

3. Online Portal

At Boulder County's written request, the Contractor can set up a web-based rebate application tracking platform. This platform will enable residents and businesses of Boulder County to access information about the available rebates and submit online applications and upload required purchase and other documents. The rebate application tracking software would allow applicants to enter and review status of their application as it goes through the review and approval process. It would also provide a dashboard/web portal for Boulder County staff to view overall program performance and statistics with on demand reports.

4. Call Center

At Boulder County's written request, the Contractor will provide support via the Cypress Customer Service Center in Hemet, California. The services are available 24/7 for customers who have questions about rebates

and how to apply. The Contractor can also provide conservation information, coordination and scheduling services for County staff and for contractors supporting energy efficiency audits and technology deployment.

5. Support Services

Subject to the prior written approval and direction of Boulder County, authorized support work will be completed on an as-needed basis and billed in accordance with the Time and Material Rate Schedule in Exhibit B - Fee Schedule.

6. Data Management and Reporting Requirements

The Contractor will provide a data management and reporting system meeting the following conditions:

- Adhere to the following technical requirements and expectations:
 - Avoid the use of proprietary systems.
 - Provide the data server.
 - Boulder County will own all data and content.
 - Boulder County will own all Customer data.
 - Boulder County has administrative rights to the accounts and log-ins with Contractor and/or 3rd party provider.
- The system should be widely accepted, based on industry technology standards and be Open Database Connectivity (ODBC) compliant.
- Maintain a central store of all application data and documentation, and correspondences sent to applicant.
- Identify and associate multiple application submittals to a single commercial business record.
- Use efficient and transparent project management and metrics tracking tools.
- Provide clear reporting on achieved milestones, deliverables, goals, analysis of metrics, and suggestions for project adjustments.
- Provide functions to mitigate fraud, errors, and redundant check processing.
- Ensure that data is never stolen or used improperly.
- Be accessible to Boulder County and its partners.
- Provide up-to-date reports on-demand and periodically (weekly or monthly), as needed.
- Monthly raw data exports to Boulder County's data management system must be in Comma Separated Value "csv" format.

7. Additional Responsibilities:

The Contractor has the following responsibilities:

- At Boulder County's request, the Contractor will provide weekly reports of total rebates applications submitted, errors in the rebate application process, and application duplicates.
- All supporting documentation must be maintained and properly stored with all associated rebate transaction records.
- The Contractor will provide Boulder County with applications for auditing upon request. All data submitted should be complete and verified by the Contractor prior to Boulder County's receipt.
- Progress reports will be the basis for billing and all payments will be made "as earned" in accordance with Boulder County's standard contract terms and conditions and shall be made as

earned, in whole or in part, from available funds encumbered, beginning after the contract has been negotiated and properly executed.

- Within 60 days of the end of the life of the contract, Contractor will provide a final summary report of the impacts of its work for Boulder County, including but not limited to information on number of residents served, amount of rebates provided, and types of services rendered. In the event this contract is extended or renewed, this final report will not be required until the parties decide to finally terminate the contract.
- Boulder County will allow for certain types of subcontracting by Contractor to occur in the scope of work only under the following circumstances:
 - 1) Documentation showing that any subcontractors were chosen through a competitive bid process. Contractor must demonstrate and prove, through documentation, that the subcontractor was chosen through a competitive bid process. Boulder County reserves the right to accept or reject the documentation.
 - 2) All subcontractors must have primary offices and complete the work within the continental United States.
 - 3) Boulder County expects that core areas below may be subcontracted but may consider additional areas included in a proposal if reasonably justified.
 - Database design and management
 - Reporting
 - Training
 - Reconciliation of financial transactions
 - a. Subcontractors, whether individual or collective, cannot be responsible for more than three (3) of the above categories of work.
 - 4) Boulder County reserves the right to not accept any subcontractors identified in the submitted proposal if it so chooses.

8. Authorization to Start Work

The Contractor acknowledges that this Contract does not constitute a guarantee that Contractor will be awarded any projects or work of any kind. County may enter into agreements with other contractors who may compete with Contractor to receive individual projects. The County will assign work to the Contractor through a written task order. The task order may be a purchase order or purchase orders. The task order will list which of the services set forth in this Scope of Work are to be provided by the Contractor at that time. The County will provide notice of the task order to the Contractor via the email addresses listed in the contract cover sheet.