

## Home Energy Score Remote Service Provider Implementation Template

This document is intended for organizations seeking to provide Remote Mentoring and/or Desktop Quality Assurance services to Home Energy Score Partners and Assessors. If also seeking to become a Partner organization, this may be filled out as an addendum to the Partner Implementation Plan.

### Instructions:

1. Be as specific and detailed as possible in your responses.
2. Use this template to describe how you will deliver Home Energy Score services over the next 12- 24 months
3. All fields should be completed.
4. Please refer to the document, "Updated Quality Assurance and Mentoring Protocols for Home Energy Score" (the "Protocols Document") for further details on the sections described below.

### SERVICE PROVIDER INFORMATION

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**Name of Organization:**

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**Staff Lead for Home Energy Score:** *(Name, Organization, City, State, Phone, Email)*

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**Organization type:**  Private for-profit organization  
 Non-profit organization

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**Expected Clientele:**  Existing Program Partners (list below)  
 New Program Partners (list type below)  
 Other: \_\_\_\_\_

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**Provided Services:**  Remote Mentorship/QA  
 In-field Mentorship/QA  
 Administrative (list below)  
 Other: \_\_\_\_\_

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## **Part One: Minimum Requirements for Remote Mentors and Desktop**

### **QA Auditors**

Please describe the compliance path through which your Remote Mentors/Auditors will attain eligibility (sub section 2 of Part One in the Protocols Document). Will you be using existing HES Assessors or training new personnel? If training new assessors/mentors/auditors, please explain how you will onboard them to active Home Energy Score Assessor status.

### **Part Two: Remote Mentoring Protocol**

Using the numbered items in Part Two of the Protocols Document as a guide, please explain the specific steps of your Remote Mentoring process. Please be specific about the particular technologies being used for data collection by the Assessor Candidate, and for communication channels between mentor and mentee and between Service Provider and Home Energy Score.

Provide details of your specific Remote Mentoring process for each of the 9 subsections in Part Two. Please include any outreach or training materials that you will provide to candidate Assessors to ensure that they follow the process correctly.

Please include any instances where you have modified or improved upon the process guidance contained in Part Two. The Home Energy Score team encourages applicants to consider ways to move beyond this outline to develop innovative and effective practices for mentorship and quality assurance.

### **Part Three: Desktop Quality Assurance Protocol**

Please include “sandbox”-style login information for your DTQA interface in order that the HES team can understand from an Assessor’s perspective how your software meets the guidelines in Part 3.

Similarly, please include screen shots from a completed Assessor “packet” that represents the material that you would be receiving from the Assessors in your system.

Do you intend to follow the photo schedule as presented in the document, or do you see opportunities to improve upon the schedule in its current state? Please include your reasoning.

Please include any outreach or training materials that you will provide to new Assessors to ensure that they follow your processes correctly.

What external reference materials do you plan to use during your DTQA sessions in addition to the “packet” of photos and sketches that is submitted by the Assessor? Please describe the specific process that your DTQA Auditors will follow when a new packet is being audited, start to finish.

Please describe how you intend to comply with the Corrective Action Procedure in Part Three. Each of the five items should be addressed separately, with descriptions of the particular processes and communication media envisioned to serve each function.

Please include a copy of the agreement that you will have as a Service Provider with your Assessor “clients”, including a description of expected deliverables/actions from the Assessor. Will this agreement be used, for example, to ensure that Assessors do not deliver any of their first 10 reports to clients before they have received DTQA, as per the standard?

### **Part Four: Remote Service Provider requirements**

Using the Protocols Document as a guide, please describe how your organization meets each numbered requirement 1-5, including the sub-sections for item #2. Please be as specific as possible when describing the technologies and processes envisioned to share necessary information with the HES team, and when describing your firm’s background in delivering quality assurance and mentorship services.

### **Part Five: Dispute Resolution and Appeals Guidelines**

Please address the individual guidelines in this section of the Protocols Document by describing your approach and preparation for these eventualities. Will you have a formal agreement or contract with the partner in question? If so, will these practices be included in that document?

**ADDITIONAL COMMENTS** (optional)

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Please provide any additional information you think would be useful.

**NEXT STEPS:** Submit your plan to [HomeEnergyScore@ee.doe.gov](mailto:HomeEnergyScore@ee.doe.gov) with your company name in the subject line and file name with the date. E.g. *Implementation Plan Missouri West 4-12-12*

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