

# MEMO

**TO:** SERC Coordinators and Agency Directors  
**FROM:** Dan Elliott and Tom Doran  
**RE:** **SERC Project(s) Administration/Best Practices Procedures**  
**DATE:** August 18th, 2011

As we begin to move forward into Project 1 Solar PV projects, the US DOE has been requesting more specific data and inquiries regarding how agencies are delivering these projects.

US DOE views, as well as OHCS, the need to develop best practices for Solar PV as all SERC participants consider the possibility of a future solar component for the national WAP.

To be effectively evaluated for integration as an eligible deliverable it becomes critical that we work closely in exchanging data and program information with the US DOE not only for required reporting elements but also to gather information that will assist the state and partnering SERC agencies with effective administration of the program.

This collective data will be used to better equip our Oregon WAP programs for the best approaches while avoiding barriers, potential waste or even abusive practices that a new industry may be inclined to. Transparency will be very important.

Therefore, to match with the information US DOE will require, OHCS is requesting cooperation from SERC participants with the following considerations:

- OHCS to be made available to any and all proposed and published RFP's, for review, input, guidance, and communication of best practice applications gleaned from and with all participating agencies.
- Notice of bid or proposal opening dates and place, for possible attendance by OHCS staff. If not convenient to attend, due to schedule for format of review process selected, forward a summary of results to OHCS for each project's replies and contract offerings. If no formal bid opening, forward process of award to OHCS.
- Agencies will forward information on selected contractor(s) and any details of planning, work force, sub-contractors (second tier) to be used, copy of contract executed.
- Forward any pertinent data about the selected PV system, manufacturer, site layout, and any special considerations due to location, environmental or availability of materials.

- Forward any final project schedule, either software program or narrative, detailing milestone dates, times and location; pre-construction meeting(s) on or off site, start date of actual work on site, local jurisdiction inspections, and commissioning of systems.
- Understanding of an “open” invitation to OHCS staff, to attend any, or all, of these milestone activities. Noting that OHCS unavailability to attend, due to conflicts of schedule, will not delay or postpone the scheduled date of activity. Notice of re-schedule of dates would be expected to be communicated to OHCS with reasonable time to schedule attendance.
- Forward any Schedule of Values developed, or agreed upon payment schedule with contractor for work in progress, for review and project management to verify all program compliance requirements have been received and/or completed.

Note: Inform OHCS, preferably in advance, of any public or media inquiries, scheduled interviews, or reports for publication for possible cooperative response.

Much of this will help us inform US DOE with the inquiries that have been coming to us and the information we gather will help all involved in the SERC program build an excellent delivery system as we walk through this together.

Tom Doran(OHCS) will also be helping to compile data and review best practices for SERC so please expect correspondence from him with future inquiries.

If you have any questions please contact I or Tom Doran [tom.doran@state.or.us](mailto:tom.doran@state.or.us)

Thank you for your help with all of this as we move forward with Project 1.

We are looking forward to speaking with you all very soon as site visits will be occurring over the next three weeks.

Best regards,

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