






## Construction Management Service

The purpose of our Construction Management Service (CM) is to manage the details of implementing energy efficiency measures in a timely, reliable manner that satisfies the homebuyer, and, in energy efficient finance situations, the lender and seller as well.

Once the customer has selected a final package of improvements, we work on their behalf with the contracting process from beginning to end, to help select the best contractors, ensure that all program and lender deadlines are met, that any problems with installation are resolved, and that the process is completed as smoothly as possible.

TASK	DESCRIPTION
 <b>As-Is Energy Rating</b>	<ul style="list-style-type: none"> <li>Run the “as-is” energy rating including the selected improvements</li> </ul>
 <b>Energy Improvement Specifications</b>	<ul style="list-style-type: none"> <li>Prepare detailed specifications for each energy improvement desired by homeowner or buyer</li> <li>Explain the timeframe and details of on-site visitation to contractor(s)</li> <li>Fax specifications to contractors</li> <li>Prepare a contract for each contractor selected</li> </ul>
 <b>Bid Collection and Review</b>	<ul style="list-style-type: none"> <li>Manage the collection of firm-fixed bids from contractors <i>at least 2 weeks prior to closing</i>. Contractors need at least a week to provide bids.</li> <li>Review bids</li> <li>Compile a one-page comparison spreadsheet for the customer</li> <li>Meet with homeowner to help select contractors for each job</li> </ul>
<b>Mortgage Facilitation</b>	<ul style="list-style-type: none"> <li>Complete the required lender and appraiser forms including copies of the selected firm-fixed bids, and distribute the documents as needed in time for the final underwriting.</li> <li>Prepare escrow summary for lender</li> </ul>

***CLOSING – Lender sets aside escrow  
to cover contractors and contractor arranging services***

<b>Contract Preparation</b>	<ul style="list-style-type: none"> <li>Prepare contracts (when notified that the closing took place)</li> </ul>
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Work usually starts as soon as possible after closing and we facilitate the process so that all work is completed within 75 days, even though some energy mortgage programs allow for longer periods. This ensures there is time on the back end to resolve any problems that may occur.

Upon work completion, the rater schedules a post-improvement inspection. If inspection meets the scope of work specified in the contract, the home is re-rated, and approval is given to the lender to pay the contractors. If the work has not been done as specified, contractors are asked to resolve outstanding issues before getting paid.

The lenders trust us as the experts and do not require an additional inspection of the energy improvements by an appraiser or home inspector.