# ANNEX A – STATEMENT OF WORK

**Solicitation Number:** PGE01-GID02-SH-001

Last Updated: November 4, 2026

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Last Updated: November 4, 2026

**[THE HIGHLIGHTED TEXT WILL BE UPDATED AT CONTRACT AWARD]**

This Statement of Work ("SOW") # [Insert Contract Number] dated [MONTH DD, YYYY] (the "Effective Date") is entered into between Portland General Electric Company ("PGE") and [Company Name] ("Contractor") pursuant and subject to the terms and conditions of the Master Purchase Agreement for Services (the "Master Agreement") between PGE and the Contractor dated [MONTH DD, YYYY]. Capitalized terms used but not otherwise defined in this SOW will have the meanings given to them in the Master Agreement. All paragraph or section references made in this SOW are references to paragraphs or sections of this SOW, unless otherwise specified. Each of PGE and the Contractor may be referred to herein as a "Party" or, if collectively, as the "Parties".

## 1. ACRONYMS AND DEFINITIONS

**AMI** means Advanced Metering Infrastructure.

**Business Day** has the meaning assigned in the Master Agreement.

**CIS** means Customer Information System.

**GIS** means Geographic Information System.

**GPS** means Global Positioning System.

**Licensed Electrician** means an individual holding a current Oregon General Journeyman Electrician license, or another Oregon electrical license authorizing the work performed, who is employed by or under contract to an Oregon-licensed electrical contractor.

**Minor Electrical Repair** means a repair to the meter socket or meter-mounting equipment at a residential self-contained service point of 200 amperes or less that

(a) a Licensed Electrician can complete during the installation visit or a single return visit, generally within two (2) hours;

(b) uses new, like-for-like materials that do not change the service rating, conductor size, or meter location;

(c) requires no work on PGE-owned service conductors other than disconnection and reconnection at the socket terminals as coordinated with PGE; and

(d) is limited to:

(i) tightening, repairing, or replacing damaged, loose, or corroded socket jaws, jaw springs, or terminal connections;
(ii) re-terminating line-side or load-side conductors at the socket;
(iii) replacing a damaged socket cover, ring, or sealing hardware, or re-securing a loose socket to its mounting surface;
(iv) repairing or re-terminating the grounding or bonding conductor connection at the meter socket; and
(v) like-for-like replacement of the meter socket when PGE approves it for the specific service point.

Minor Electrical Repair excludes panel, breaker, and branch-circuit work; service upgrades or relocations; service mast, weatherhead, and service-entrance conductor replacement; installation of new grounding electrodes; trenching or underground work; structural, siding, or finish repair; hazardous-material abatement; and any work PGE determines exceeds this definition.

**MIV** means the Meter Installation Vendor serving as the Contractor under this SOW.

**Program** means PGE's Next Generation AMI Program.

**Project** means the meter deployment project described in this SOW in support of the Program.

**PGE** means Portland General Electric Company.

**SOW** means this Statement of Work.

## 2. PROJECT TITLE

Meter Installation Vendor Services for the Next Generation AMI Program

## 3. PROJECT LOCATION

The Project will be performed throughout PGE's electric service territory in Oregon. The Contractor shall perform meter installation, deployment, inventory management, customer interaction, quality assurance, and related Services at customer locations and other approved work sites within the service territory. Certain project management, reporting, scheduling, data management, customer-support, and administrative activities may be performed remotely, subject to the requirements of the Master Agreement and this SOW.

Remote performance does not relieve the Contractor of its obligation to comply with all applicable security, confidentiality, data-protection, records-management, and performance requirements contained in the Master Agreement and this SOW.

## 4. PURPOSE, BACKGROUND AND OBJECTIVES

**Introduction – Customer Touchpoints.** Sections 4.1 and 4.2 establish the purpose and background for PGE's Next Generation AMI meter deployment. Because the work will occur at customer locations across PGE's service territory, successful execution depends on a coordinated customer experience before, during, and after each meter exchange. Key customer touchpoints include advance notification, field crew identification, on-site interaction, successful or unsuccessful installation notices, customer inquiries and complaint handling, escalation to PGE when needed, and follow-up for inaccessible meters, service issues, or corrective work. These touchpoints should be planned and managed as part of the deployment approach to minimize customer disruption, maintain trust, and support safe, accurate, and efficient meter replacement.

### 4.1. Purpose

PGE requires a qualified Meter Installation Vendor ("MIV") to provide meter deployment Services in support of PGE's Next Generation Advanced Metering Infrastructure ("AMI") Program. The Contractor shall perform meter exchange, deployment management, inventory control, quality assurance, customer interaction, reporting, and related Services necessary to replace existing electric meters with new AMI-enabled meters throughout PGE's service territory.

### 4.2. Background

PGE's current AMI system was deployed beginning in 2008 and comprises approximately 967,000 electric meter endpoints. The existing system is approaching end-of-life, and PGE is procuring a next-generation AMI system that will replace existing meters with advanced solid-state electronic meters.

This SOW supports the deployment portion of PGE's Next Generation AMI Program. The Contractor will provide the workforce, management, systems, tools, equipment, facilities, processes, and related Services necessary to perform high-volume meter exchanges throughout PGE's service territory. PGE will furnish the AMI meters, communication modules, and other materials expressly identified as PGE-furnished.

Actual quantities of meter installations will vary based on deployment phasing, final system design, customer access, field conditions, meter population changes, and other Program requirements. Compensation will be determined in accordance with Attachment I, Basis of Payment.

The deployment will be performed through geographic work zones established and directed by PGE. Within each work zone, the Contractor shall systematically exchange existing meters with new AMI meters in accordance with the deployment sequence established by PGE. Work zones may be organized by circuit, substation service area, geographic grid, or another methodology selected by PGE. PGE retains sole responsibility for establishing work-zone priorities and deployment sequencing.

PGE anticipates phased deployment over approximately three (3) to six (6) years.

The Contractor shall submit the initial Project Schedule, detailed baseline Project Schedule, and Deployment Design Document in accordance with Section 7. The Deployment Design Document shall define the proposed deployment approach, production assumptions, staffing model, inventory-management approach, integration requirements, reporting procedures, and coordination requirements.

Regardless of the final deployment sequence, the Contractor shall perform the Services in accordance with the performance requirements, service levels, acceptance criteria, and deployment targets established in this SOW.

### 4.3. SOW Objectives

4.3.1 The primary objectives of the Project are to:

4.3.1.1 Safely replace existing electric meters with new AMI-enabled meters throughout PGE's service territory;

4.3.1.2 Support deployment of PGE's next-generation AMI system through efficient, accurate, and high-quality meter exchange Services;

4.3.1.3 Maintain accurate installation records, meter inventories, asset-tracking information, photographic documentation, GPS data, and work-order records;

4.3.1.4 Achieve required quality standards, installation accuracy requirements, data accuracy requirements, and customer-service performance standards;

4.3.1.5 Minimize customer disruption while maintaining safe, professional, and effective field operations;

4.3.1.6 Establish effective coordination among the Contractor, PGE, PGE's meter shop, AMI system suppliers, and other Project stakeholders; and

4.3.1.7 Provide Project controls, reporting, inventory management, quality assurance, and deployment management processes necessary to support successful completion of the Program.

4.3.2 In furtherance of the foregoing objectives, the Contractor shall perform the Tasks and provide the Deliverables specified in this SOW.

## 5. SOW TERM

### 5.1. Term

This SOW becomes effective on the Effective Date and will remain in effect until the earlier of:

a. Final completion and acceptance of the Services;
b. Six (6) years after the Effective Date; or
c. Earlier termination in accordance with the Master Agreement.

### 5.2. Extension

The SOW term may be extended only through a Change Order executed by authorized representatives of both Parties.

### 5.3. Project Schedule

The Contractor shall perform the Services and provide the Deliverables in accordance with the approved Project Schedule. Work-zone sequencing, milestones, Deliverable due dates, and deployment targets may be adjusted through the Project Schedule management process, provided that no schedule adjustment may change the scope, compensation, material Deliverable requirements, or overall SOW term without a Change Order executed in accordance with the Master Agreement.

### 5.4. Survival

Expiration or termination of this SOW will not affect obligations that by their nature are intended to survive, including confidentiality, data protection, records retention, audit access, ownership, indemnification, warranty, correction of deficient Work, and final inventory and data reconciliation.

## 6. SCOPE OF SERVICES

### 6.1. General Scope

The Contractor shall provide all labor, supervision, project management, facilities, equipment, vehicles, tools, systems, materials other than those expressly furnished by PGE, and other resources necessary to perform the Services in support of PGE's Next Generation AMI Program.

The Services include planning, mobilization, deployment-readiness activities, systems integration, meter installation, inventory management, customer interaction, quality assurance, reporting, project administration, work-zone closeout, and final Project closeout.

The Contractor's responsibilities include receipt, inventory management, safeguarding, installation, programming, interrogation, validation, documentation, replacement, and return or disposition, as directed by PGE, of PGE-furnished AMI meters, communication modules, and related materials.

Procurement, manufacture, ownership, and supply of those PGE-furnished materials remain the responsibility of PGE. PGE retains ownership of all PGE-furnished meters, PGE Data, communication modules, and related materials, including both new meters provided for installation and meters removed from service.

### 6.2. Base Residential Scope

The base scope includes the exchange of residential single-phase Form 2S meters, limited to self-contained installations, within geographic work zones assigned by PGE.

For each meter included in the base residential scope, the Contractor shall perform the applicable installation, programming, interrogation, validation, documentation, inventory-management, quality-control, customer-interaction, and closeout activities required by this SOW.

Residential service points with nonstandard metering configurations, including net metering, bidirectional registers, multiple meters, or other configurations PGE identifies, shall be flagged by PGE

in the work-order data and handled under the special-handling procedures approved under Task 1; the Contractor shall not exchange a flagged meter except in accordance with those procedures.

The Contractor shall provide qualified personnel, equipment, systems, processes, supervision, and operational resources sufficient to perform high-volume residential meter exchanges under the urban, suburban, rural, weather-related, customer-access, and other field conditions that may be encountered within PGE's service territory. Personnel performing routine residential AMI meter exchange services shall comply with the labor representation requirements set forth in Section 8.2.1.

The base residential scope constitutes the Services PGE presently anticipates authorizing at Contract Award, subject to the final executed Contract. References in this SOW to the "base scope" mean the residential Services described in this Section.

### 6.3. Optional Meter Services

PGE may, at its discretion, authorize the Contractor to perform optional meter Services during the Contract term. Optional Services may include:

- Residential single-phase Form 1S meter exchanges;
- Residential Form 12S (network) meter exchanges;
- Combined commercial and industrial self-contained meter exchanges, whether single-phase or polyphase;
- Combined commercial and industrial transformer-rated meter exchanges, whether single-phase or polyphase;
- Commercial and industrial network meter exchanges;
- Other meter forms or installation types expressly identified in Attachment I or in a written authorization issued by PGE;
- Optional Minor Electrical Repairs as described below; and
- Optional acceptance testing of PGE-furnished meters as described below.

Pricing for optional Services is contained in Attachment I. Inclusion of such pricing in Attachment I does not constitute authorization to perform the optional Services.

PGE may exercise all, some, or none of the optional meter Services. PGE does not guarantee any minimum quantity, dollar value, meter form, installation type, work zone, or duration for optional Services.

PGE may continue to perform some or all optional meter work using PGE's meter shop, another contractor, or other resources selected by PGE. The Contractor has no exclusive right to perform optional meter Services.

Before optional Services begin, PGE will issue written authorization identifying:

- The authorized meter forms and installation types;
- The authorized quantities or work orders;
- The applicable geographic areas or work zones;
- The required commencement and completion dates;
- Applicable qualifications and training requirements;
- Applicable technical, installation, testing, safety, quality, reporting, and acceptance requirements; and
- The applicable pricing contained in Attachment I.

The Contractor shall not perform, subcontract, or invoice PGE for any optional meter Services unless PGE has provided written authorization before performance. Written authorization must be issued by the PGE

Contract Administrator or another PGE representative expressly authorized under the Contract to authorize the applicable Services. Direction, communication, or approval from field personnel, Project personnel, technical personnel, or another individual who lacks such authority does not authorize optional Services, amend the Contract, or entitle the Contractor to additional compensation. A notice to proceed may authorize optional Services only if the applicable scope, price, qualifications, schedule, and acceptance requirements are already established in the executed SOW. Any authorization that changes the SOW scope, price, material requirements, or term must be documented through a Change Order executed in accordance with the Master Agreement.

The Contractor shall provide personnel with qualifications, experience, licenses, certifications, and training appropriate to each authorized optional meter form and installation type.

Unless the written authorization expressly states otherwise, all terms and requirements of this SOW applicable to residential meter Services, including requirements concerning safety, customer interaction, inventory control, asset-tracking, data capture, quality assurance, reporting, acceptance, warranty, and record retention, will also apply to authorized optional meter Services.

**Optional Meter Acceptance Testing.** PGE may, at its discretion and by written authorization issued in the manner described above, authorize the Contractor to perform sample acceptance testing of PGE-furnished meters before installation, in accordance with PGE's Electric Meter Test and Inspection requirements, ANSI C12.1, and applicable Oregon Public Utility Commission rules. Sample acceptance testing shall be performed in accordance with Annex I (Acceptance and Exception List), Sections 6.2 through 6.6, under the testing path selected by PGE, including the sampling plan, test equipment and calibration requirements, reporting timeframes, and failed-Lot procedures stated there. Pricing for optional meter acceptance testing is contained in Attachment I, Basis of Payment.

**Optional Minor Electrical Repairs.** PGE may, at its discretion and by written authorization issued in the manner described above, authorize the Contractor to provide Licensed Electricians to perform Minor Electrical Repairs to address conditions identified during meter exchanges. Licensed Electricians performing Minor Electrical Repairs shall meet the IBEW representation requirements of Section 8.2.1. An installer who identifies a condition that potentially meets the definition of a Minor Electrical Repair shall follow the unsafe-condition procedure in Task 3 and record it using the applicable outcome code. The Contractor shall perform a Minor Electrical Repair only after

(a) PGE has approved the repair for that service point through the process documented in the Deployment Design Document, and

(b) the customer, or a person authorized to act for the customer, has consented in writing on a PGE-approved form, unless PGE directs otherwise.

The Contractor shall obtain all permits, labels, and inspections required by the Oregon Building Codes Division or the local authority having jurisdiction. It shall coordinate any de-energization of the service with PGE and shall not re-energize the service until applicable inspection requirements are satisfied or PGE directs otherwise. It shall furnish new, listed materials that comply with PGE's electric service requirements, and where practicable shall complete the meter exchange on the same visit using personnel who meet the requirements of Section 8.2.1. For each repair, the Contractor shall record before-and-after photographs, a description of the repair, materials used, the electrician's name and license number, the permit or label number, and the inspection result. If a condition exceeds the definition of Minor Electrical Repair, the Contractor shall not proceed, shall document the condition, and PGE will determine the remediation path. Minor Electrical Repairs are warranted in the same manner as other Work and are priced in Attachment I. PGE does not guarantee any quantity of Minor Electrical Repairs.

### 6.4. Performance Requirements

The Contractor shall perform the Services in accordance with this SOW, the approved Project Schedule, the approved Deployment Design Document, applicable PGE standards and procedures, and all applicable laws, regulations, safety requirements, quality requirements, cybersecurity requirements, and data-protection requirements.

The Contractor shall maintain a data accuracy rate of at least 99.9% for installation records and meter data captured under this SOW, measured using the methodology specified by PGE, and covering, at a minimum, meter-to-service-point association, meter and register configuration, multiplier and unit-of-measure values, initial and final reads, work-order information, and acceptance of required records by PGE systems. The Contractor shall implement and maintain quality-control processes sufficient to achieve this requirement and shall promptly investigate and correct identified data discrepancies.

**Meter-to-Cash Readiness.** Not less than ninety-eight percent (98%) of the installations completed in each week shall be billing-ready within three (3) Business Days after installation, as measured by PGE. An installation is billing-ready when the installation record has been accepted by PGE systems, the meter and endpoint are correctly associated with the service point and customer account, endpoint registration is successful, required register and interval data are available to PGE, and no unresolved Contractor-caused exception exists that would prevent accurate billing. For installations performed during a billing window or within five (5) Business Days prior to the applicable bill-cycle cutoff, the Contractor shall prioritize processing and resolution activities as necessary to ensure billing readiness by the applicable bill-cycle cutoff. No Contractor-caused error, omission, or exception shall result in a customer's bill being delayed, estimated when an actual bill could otherwise have been issued, held from processing, or otherwise processed outside the applicable billing cycle. The Contractor shall report billing-ready performance and the aging of open exceptions in the weekly status report and shall correct Contractor-caused exceptions before the affected bill-cycle cutoff identified by PGE.

**Customer Information and Data Security.** The Contractor shall protect customer information and PGE operational data received or created under this SOW in accordance with the Master Agreement and the Security Addendum attached thereto.

The Contractor shall meet or exceed a sustained production rate of not less than sixty-eight (68) meter exchanges per crew per Business Day. In addition, the Contractor shall meet an overall monthly production requirement of not less than 12,000 meter exchanges across all active crews.

Production targets may be refined in the approved Deployment Design Document based on meter density, geography, and access conditions; however, neither the per-crew daily production requirement nor the overall monthly production requirement may be reduced below the minimums stated in this Section without a Change Order. Sustained performance below the minimum production requirements established in this Section for two (2) consecutive months shall require a root-cause analysis and a recovery plan acceptable to PGE.

**Progress Milestones.** The baseline Project Schedule shall establish cumulative monthly deployment requirements and progress milestones at the end of the Initial Deployment Area and at intervals of not more than six (6) months thereafter through completion of deployment. Acceptable progress at each milestone means cumulative completed work orders (successful exchanges plus Unable-to-Complete work orders returned to PGE after the attempt process) of not less than ninety-five percent (95%) of the cumulative deployment requirement. If PGE-furnished meters, data, or other PGE-provided items required to support the schedule are not available when scheduled, the cumulative deployment requirement and milestone quantities for the affected period shall be reduced by 1.25 times the percentage of installations that could not be performed for that reason. Revisions to the Deployment Schedule or milestones shall be made through the Project Schedule management process in Section 5.3; PGE will approve a Contractor-requested revision that results from Force Majeure or PGE-caused delay, or that changes the cumulative schedule for the following three (3) months by no more than fifteen percent (15%) without preventing achievement of the remaining milestones, and PGE will not reduce the scheduled quantity for any single subsequent month by more than five percent (5%) without the Contractor’s agreement.

The Contractor shall comply with the installation error-rate, audit, corrective-action, and reporting requirements stated in Sections 7.4.12 through 7.4.19.

The Contractor shall maintain a substantiated customer complaint rate of no more than one percent (1.0%) of completed installations during each monthly reporting period. The complaint-rate methodology, including the definition of a substantiated complaint, treatment of multiple complaints relating to a single installation, applicable exclusions, reporting period, source data, and correction of data errors, shall be approved by PGE and documented in the Deployment Design Document. The Contractor shall report complaint activity weekly and shall calculate and report compliance with the substantiated customer complaint-rate requirement monthly. The Contractor shall monitor complaint trends and promptly investigate recurring or systemic issues. If the substantiated customer complaint rate exceeds one percent (1.0%) during a monthly reporting period, the Contractor shall perform a root-cause analysis and submit a corrective-action plan acceptable to PGE. Exceeding the standard does not relieve the Contractor of its obligation to investigate, respond to, document, and resolve each complaint in accordance with this SOW.

The Contractor is responsible for loss, theft, misplacement, unexplained disposition, or damage to PGE-furnished inventory occurring while the inventory is in the Contractor's custody, care, or control, except to the extent caused by PGE. The Contractor shall promptly report each known or suspected loss, theft, material inventory discrepancy, or instance of damage after discovery and shall document the affected asset, circumstances, custody history, investigation, corrective action, and final disposition. If the monthly inventory loss or damage rate exceeds one percent (1.0%), the Contractor shall immediately notify PGE and submit a corrective-action plan within five (5) Business Days. The one-percent threshold does not excuse or defer reporting of individual losses, thefts, material discrepancies, or damaged assets.

**Liquidated Damages.** Contractor's failure to achieve a Progress Milestone established under this Section 6.4, after giving effect to any applicable schedule adjustment under this SOW, may result in liquidated damages in accordance with the liquidated damages provisions of the Master Agreement. The Contractor's implementation of corrective action, a recovery plan, or other mitigation measures does not relieve the Contractor of its obligation to achieve an applicable Progress Milestone or otherwise limit PGE's rights or remedies under the Master Agreement.

### 6.5. PGE Standards and Procedures

Before the Contractor begins field Work, PGE will provide or identify the versions of PGE standards, procedures, manuals, training requirements, and technical instructions applicable to the Services. The Contractor shall maintain access to the current applicable versions and shall ensure that affected personnel and subcontractors are trained before performing the applicable Work.

If PGE issues a revised standard or procedure after the Effective Date, the Contractor shall comply with the revision on the effective date identified by PGE. If compliance with the revision materially changes the authorized scope, compensation, material Deliverable requirements, or SOW term, the Parties will address the impact through the Change Order process. Safety requirements necessary to address an immediate hazard apply when directed by PGE and do not require advance Change Order as a condition of immediate compliance.

### 6.6. Order of Precedence

The detailed requirements, tasks, subtasks, deliverables, acceptance criteria, reporting obligations, performance requirements, and other Contractor responsibilities are identified elsewhere in this SOW. If a conflict exists among provisions within this SOW, the more specific requirement governs over a more general requirement. No optional meter Services are authorized unless PGE expressly authorizes them

in writing under Section 6.3. The order of precedence among this SOW, the Master Agreement, and other Contract documents is governed by the Master Agreement.

### 6.7. Scope Exclusions

Unless expressly required by this SOW, authorized as an optional Service under Section 6.3, or authorized through a Change Order executed by authorized representatives of both Parties, the following activities are outside the scope of this SOW:

6.7.1 Procurement, manufacture, ownership, supply, laboratory testing, calibration, certification, repair, refurbishment, or disposition of PGE-furnished meters, communication modules, tamper tags, seals, and related materials, except for activities expressly assigned to the Contractor or authorized as optional Services under Section 6.3;

6.7.2 Installation of AMI network infrastructure, including collectors, repeaters, gateways, and similar communications infrastructure;

6.7.3 Optional meter Services, including residential Form 1S, residential Form 12S, commercial, industrial, and network meter Services, not expressly authorized under Section 6.3;

6.7.4 Engineering design services, environmental permitting activities, and regulatory filing activities;

6.7.5 Utility distribution-system construction unrelated to the authorized meter-deployment Services;

6.7.6 Meter-shop functions retained by PGE;

6.7.7 Services assigned to the AMI system supplier or another PGE contractor;

6.7.8 Electrical repairs, upgrades, or modifications to customer-owned or PGE-owned service equipment, other than Minor Electrical Repairs authorized under Section 6.3; and

6.7.9 Services not expressly required by this SOW or authorized through the applicable Change Order process.

## 7. CONTRACTOR TASKS

Within fifteen (15) Business Days after the Effective Date, the Contractor shall submit an initial Project Schedule for PGE review. The initial Project Schedule must identify mobilization, systems integration, deployment-readiness activities, facility-readiness activities, training, Deliverables, major milestones, and the planned date for commencement of production deployment.

Within sixty (60) calendar days after the Effective Date, the Contractor shall submit the Deployment Design Document and a comprehensive, integrated baseline Project Schedule covering the entire Project from mobilization through final Project closeout.

The baseline Project Schedule must incorporate PGE's comments on the initial Project Schedule and, at a minimum, identify all material Project activities, work-zone sequencing and deployment activities, activity durations and dependencies, production assumptions and planned production rates, staffing and crew ramp-up, systems integration and testing, training and deployment-readiness activities, facility and inventory readiness, PGE-furnished material requirements, key PGE and Contractor dependencies, Progress Milestones established under Section 6.4, Deliverable due dates, work-zone completion dates, and final Project closeout.

The baseline Project Schedule shall be sufficiently detailed to enable PGE to monitor Project progress, evaluate actual performance against planned performance, identify schedule risks and delays, and assess the effect of changes or delays on Progress Milestones and the overall Project completion date.

The Contractor shall maintain and update the approved baseline Project Schedule throughout the Project to reflect actual progress, approved schedule changes, current forecasts, and changes to the sequencing, timing, or status of Project activities. Schedule updates shall not alter an approved Progress Milestone or otherwise modify the Contractor's contractual obligations except in accordance with Section 5.3.

The Contractor shall not commence production deployment until PGE has approved the Deployment Design Document and baseline Project Schedule and has provided written authorization to proceed.

The first work zone or combination of work zones designated by PGE, comprising approximately 10,000 meters in total, constitutes the Initial Deployment Area. During deployment in the Initial Deployment Area, PGE will evaluate the Contractor's processes, systems integration, data exchange, inventory handling, quality results, and customer-facing performance, and the Contractor shall refine its procedures as PGE directs before proceeding further. The Contractor shall not proceed to full-rate deployment beyond the Initial Deployment Area until PGE has provided written authorization to do so.

Unless this SOW specifies a different period, each Party shall review and respond to routine submittals from the other Party, including procedures, plans, schedules, reports, and customer-facing materials, within five (5) Business Days after receipt. The thirty (30) calendar-day review period in Section 11 applies only to the numbered Deliverables.

The Contractor shall perform the following Tasks and subtasks:

### 7.1. Task 1 – Project Planning and Mobilization

The Contractor shall plan, mobilize, and prepare for deployment activities, including:

7.1.1. Participating in the Project kickoff meeting, which PGE will convene within fourteen (14) Business Days after the Effective Date to establish Project governance, communication protocols, Key Personnel introductions, and alignment on Project objectives;

7.1.2. Developing the Project Charter defining Project scope, objectives, success criteria, organizational structure, and roles and responsibilities;

7.1.3. Planning, facilitating, and documenting a series of not more than six (6) customer experience workshops, each up to three (3) hours, with PGE Customer Service, Corporate Communications, the PGE meter shop, and the PGE Project team, held at PGE facilities or virtually as PGE directs, within thirty (30) Business Days after the kickoff meeting. The workshops shall address, at a minimum:

(a) customer journeys for routine exchanges, medical-certificate and other flagged accounts, access issues, refusals, and safety disconnects, including communications before, during, and after the exchange;

(b) the hand-off between the Contractor's customer-service function and PGE's Customer Service Center, including warm-transfer procedures, triggers, hours, and scripts;

(c) printed and digital customer materials, including notification letters, door hangers, leave-behind materials, web-page copy and assets, and FAQ content, and the review and approval process for each;

(d) language support;

(e) customer-service training content for Contractor field and office personnel, and talking points, Q&A, and training resources for PGE customer service representatives; and

(f) a RACI matrix for customer-facing tasks. The Contractor shall bring to the workshops its proposed approach to each topic, drawn from its proposal and prior deployments, and shall record decisions, open items, and owners;

7.1.4. Submitting, within fifteen (15) Business Days after the final workshop, a Customer Experience and Communications Plan documenting the agreed customer journeys, hand-off procedures, materials inventory and approval workflow, language support, training content, RACI, and escalation paths, for PGE review and acceptance under Section 11. Upon PGE's acceptance of the Plan under Section 11, the Plan becomes a requirement of this SOW and the Contractor shall perform the Services in accordance with it. Changes to the accepted Plan that do not alter the Contractor's scope or price may be made by written agreement of the Project Managers; all other changes require a Change Order. Customer-facing field Work shall not commence in any work zone until the Plan is accepted by PGE under Section 11;

7.1.5. Developing deployment schedules, staffing plans, resource plans, production assumptions, and work-zone implementation plans for the authorized scope, which shall account for PGE bill cycles, meter-read schedules, billing cutoffs, and the time required to resolve exceptions before billing; the Contractor shall promptly notify PGE of any material schedule change that could place a bill cycle at risk;

7.1.6. Developing, for PGE approval before production deployment, a standard set of field outcome and observation codes (covering general observations, access failures, Unable-to-Complete reasons, conditions potentially qualifying as Minor Electrical Repairs, conditions requiring customer-arranged repair, and conditions requiring referral to PGE's revenue-protection function) and special-handling procedures for key accounts coordinated through PGE account managers, hazard-coded premises, locked meter rings and PGE-held customer keys, meters without a bypass serving traffic signals or railroad crossings, and meters with socket adapters or external wiring. The codes and procedures shall be reviewed in the customer experience workshops and documented in the Deployment Design Document;

7.1.7. Developing contingency and recovery plans to address storms, outages, workforce disruptions, and other significant operational events that could affect deployment activities, and to address delayed or missing meter data, failed endpoint registration, interface outages, rejected installation records, non-communicating meters, and unresolved exceptions approaching a billing cutoff, including interim manual-read or other billing-continuity procedures and the Party responsible for each. The Contractor shall use commercially reasonable efforts to minimize schedule impacts resulting from such events and shall provide recovery plans when those events materially affect deployment activities;

7.1.8. Establishing and maintaining Project controls and documented issue-management procedures sufficient to:

a) Track schedule performance, production rates, quality metrics, costs, risks, inventory, and other key performance indicators, using earned value management or an equivalent PGE-approved methodology;

b) Provide early warning of material schedule, cost, quality, safety, customer-service, or inventory deviations;

c) Identify, document, investigate, escalate, correct, and resolve operational issues, schedule delays, quality deficiencies, safety concerns, customer-service issues, inventory discrepancies, and other Project-related challenges; and

d) Track root cause, responsible party, corrective action, target resolution date, actual resolution date, status, and applicable PGE-notification thresholds; and, for billing-impacting issues, the

affected customer or service point, applicable bill-cycle cutoff, severity, aging, interim workaround, and confirmation that corrected information was successfully reprocessed by PGE.

7.1.9. Securing required facilities, warehouse space, staging areas, equipment, vehicles, tools, and systems;

7.1.10. Establishing standard field work hours and work days, documented in the Deployment Design Document, and providing PGE at least four (4) weeks' notice of any planned change to the standard schedule and at least two (2) Business Days' notice of any day on which installation activity will vary significantly from normal levels, such as weekend catch-up work, so that PGE dispatch and emergency support can be staffed accordingly. Work performed outside the Contractor's standard field hours or on a weekend is separately compensable under the applicable Basis of Payment adder only when expressly authorized by PGE in writing;

7.1.11. Establishing inventory-management, chain-of-custody, and asset-tracking procedures;

7.1.12. Developing installation procedures for each meter form and installation type included in the authorized scope, together with safety procedures (including lockout/tagout, arc-flash protection, and personal protective equipment), procedures for identifying, approving, permitting, performing, inspecting, and documenting Minor Electrical Repairs if that optional Service is authorized, customer-interaction and complaint-resolution procedures, quality-assurance, audit, and correction procedures, incident-reporting and escalation procedures, and data-capture and work-order completion procedures. The Contractor shall submit all such procedures to PGE for review and approval before commencing field Work. All procedures shall comply with PGE standards, OSHA requirements, Oregon workplace-safety regulations, and applicable industry standards, and PGE may require modification of any procedure at any time;

7.1.13. Developing and implementing environmental-compliance, hazardous-material handling, spill-response, waste-management, recycling, transportation, and disposal procedures applicable to the Services and consistent with the Master Agreement and PGE's Environmental Requirements. The procedures must address segregation, labeling, secure storage, chain of custody, transport, and PGE-directed disposition of removed meters; must separately identify meters containing mercury switches, batteries, or other regulated materials; and must prohibit disposal, recycling, sale, refurbishment, or transfer of any removed meter except as PGE directs in writing;

7.1.14. Developing and implementing a training and qualification program for all personnel assigned to the Services, including training applicable to each authorized meter form and installation type, PGE-required safety and fire-season training, customer-interaction requirements, data and work-management procedures, and escalation protocols. The Contractor shall maintain complete training and qualification records and provide them to PGE upon request. The training program shall include procedures for recognizing, documenting, preserving evidence of, and escalating suspected meter tampering, unauthorized energy diversion, theft-of-service indicators, and other conditions requiring referral to PGE. Training shall also address arc-flash awareness, lockout/tagout, personal-protective-equipment requirements, emergency procedures, customer de-escalation, quality and documentation standards, and operation of the work-management system and field devices. No individual shall perform unsupervised installations until qualified through the Contractor's training program and approved by PGE. PGE may audit the training program and records, require additional training, and require retraining of any individual. Fire-season training includes the annual attestation required by PGE and extends to all subcontractor personnel performing outdoor Work;

7.1.15. Developing and maintaining a Hardware, Software, and Tools Management Plan identifying the equipment, software, field devices, vehicles, tools, and systems required to perform the Services, including any items requiring PGE review or approval, which the Contractor shall obtain before procuring or deploying those items. Field devices shall support electronic work-order

management, meter programming, endpoint interrogation, photographic documentation, and GPS capture, and shall synchronize data with the Contractor's work-management system and, where required, with PGE systems in real time or near-real time; and

7.1.16. Obtaining all required PGE approvals before commencing production deployment.

### 7.1.17. Facility and Inventory Logistics

The Contractor shall provide, operate, and maintain warehouse, staging, office, parking, and training facilities necessary to perform the Services unless expressly provided by PGE. Facilities shall be subject to PGE approval and must be located within a five (5)-mile radius of PGE's meter shop located at 3100 NW Industrial St., Portland, OR 97210.

PGE will furnish AMI meters and communication modules to the Contractor through drop shipping from the manufacturer. The location for receipt, staging, transfer, storage, and distribution of PGE-furnished inventory will be established prior to mobilization and documented in the Deployment Design Document.

PGE may, at its discretion, provide Contractor access to PGE-owned facilities, yard space, warehouse space, or other staging areas under a separate written agreement. The Contractor shall be responsible for the costs of any facilities, warehouse space, yard space, or staging areas obtained or leased by the Contractor. Any charges, operating responsibilities, access conditions, or other costs associated with PGE-owned facilities shall be stated in the separate written agreement; no such charges apply unless expressly agreed to in writing.

Before mobilization, PGE and the Contractor shall establish the inventory receipt, custody-transfer, cross-dock, storage, staging, and distribution process applicable to PGE-furnished inventory. The Deployment Design Document shall identify:

a) The warehouse, cross-dock, staging, and other facilities to be used;

b) The Party responsible for providing, operating, securing, and maintaining each facility;

c) The locations and procedures for receipt, inspection, acceptance, custody transfer, storage, staging, allocation, and distribution of PGE-furnished inventory;

d) The point at which custody and responsibility for PGE-furnished inventory transfer between PGE and the Contractor;

e) The records, approvals, and chain-of-custody documentation required for each inventory transfer; and

f) The coordination procedures applicable to PGE's meter shop, the Contractor, the AMI system supplier, carriers, and other applicable Project stakeholders.

The Contractor shall record receipt of each shipment of PGE-furnished inventory and, within twenty-four (24) hours after delivery, provide PGE with confirmation of receipt and the corresponding packing slip, bill of lading, or other applicable shipping documentation. The Contractor shall promptly identify and report any visible shipping damage, quantity discrepancy, missing material, or other discrepancy identified during receipt.

The Contractor shall implement and maintain the approved inventory-transfer, chain-of-custody, storage, security, staging, and meter-shop coordination procedures throughout performance of the Services.

Inventory controls shall include, at a minimum:

(a) an operating stock of approximately four (4) weeks of meters at each facility, or such other level as PGE approves;

(b) measures to minimize meters held in inventory for more than six (6) months after receipt, with no more than five percent (5%) of uninstalled meters held beyond twelve (12) months, in light of meter warranty terms;

(c) a physical inventory and reconciliation of records at each storage location at least every twelve (12) months, upon opening or closing a facility, and at Project closeout;

(d) a bill of lading or equivalent transfer record for every movement of PGE-furnished inventory to any party other than Contractor personnel, with copies provided to PGE;

(e) sorting of removed meters by the disposition categories PGE specifies, with meters containing mercury switches or non-removable batteries separated for PGE handling as hazardous material, and at least five (5) Business Days' notice to PGE for pickup of removed meters; and

(f) replacement of, or reimbursement to PGE for, meters lost or unaccounted for, based on PGE's documented weighted-average replacement cost for the applicable meter category.

The Contractor shall coordinate inventory forecasting, allocation, replenishment, reconciliation, and reporting activities with PGE and PGE's meter shop to support deployment activities and avoid disruption to ongoing meter-shop operations. The Contractor and PGE's meter shop will draw from a common AMI meter inventory pool; PGE will maintain a reserved allocation for meter-shop use on outside-zone Work, separate from the Contractor's deployment inventory. The Contractor shall maintain buffer stock at the level agreed with PGE to sustain continuous production and shall reconcile inventory with PGE weekly. Inventory controls shall include secure receiving and warehousing, perpetual inventory tracking, cycle counting, and reconciliation.

### 7.2. Task 2 – Systems Integration and Deployment Readiness

The Contractor shall configure, test, and validate the systems required to support deployment activities, including:

7.2.1. Developing and maintaining the Contractor-side system interfaces required for the Services. PGE is responsible for developing and maintaining PGE-side interfaces. PGE operational technology and enterprise systems that may support the deployment include:

- Maximo
- IQGeo
- Neara
- Oracle Utilities - C2M
- Kraken - CIS
- PowerTrack

7.2.2. Facilitating one or more systems-integration workshops with PGE's IT team before production deployment to define the preferred solution architecture, identify required integrations, and validate operational workflows for both Parties. The Parties will evaluate use of PGE's systems based on feasibility and cost-effectiveness; PGE desires to use PGE OT systems to support meter deployment.

7.2.3. Configuring field devices, work management systems, data interfaces, and data exchange processes;

7.2.4. Developing and submitting a Systems Integration and Deployment Readiness Test Plan for PGE review and approval before commencement of testing activities;

7.2.5. Conducting integration, user acceptance, and deployment readiness testing of applicable Contractor and PGE systems, including validation of required data flows, interfaces, error-handling processes, reporting functionality, and data-transfer requirements. Testing shall be end-to-end, from work-order receipt through field completion, data transmission, PGE receipt, record validation, processing, exception routing, correction, reprocessing, and availability of the data in PGE's downstream systems; successful file transmission alone does not constitute successful processing;

7.2.6. Identifying, documenting, and resolving defects, deficiencies, and exceptions identified during testing. Defects affecting accurate billing, required meter data, meter-to-service-point association, or downstream record processing are billing-blocking defects and shall be resolved, or expressly accepted by PGE with an approved workaround, before production deployment; and

7.2.7. Implementing, with PGE, record-level acknowledgments for every installation record submitted, including accepted and rejected record counts, error codes, duplicate prevention, retry handling, correction files, reprocessing, and daily reconciliation, so that the Contractor can confirm at any time whether each submitted record has been accepted and processed by PGE or remains an open exception;

7.2.8. Demonstrating readiness to support production deployment activities;

7.2.9. Providing data to PGE in the format, structure, frequency, and method specified by PGE, including all installation records, work-order updates, meter and endpoint information, GPS coordinates, photographs, inventory updates, exception records, customer-interaction records, and quality results necessary for PGE to consume the data into its systems; supporting PGE-defined file layouts, interface specifications, field definitions, validation rules, naming conventions, and transmission protocols; and making no material change to file formats, data structures, delivery methods, systems, tools, or integration processes without PGE's prior written approval; and

7.2.10. Maintaining a business-continuity and disaster-recovery plan for the work-management system, field devices, data interfaces, and PGE data in the Contractor's custody, subject to PGE approval and audit, and responding to data-exchange failures, corrupted or missing data, or late postings within twenty-four (24) hours.

### 7.3. Task 3 – Deployment Execution

The Contractor shall perform meter-deployment Services within the geographic work zones assigned and authorized by PGE, including:

7.3.1. Scheduling and dispatching qualified field crews, maintaining a detailed work-zone deployment schedule updated weekly, optimizing route efficiency, and incorporating PGE priority Work into daily dispatch, observing the billing-read blackout dates PGE provides for each route (no exchanges within a route's blackout window), and performing exchanges during the Contractor's standard field hours established under Task 1, unless a customer requests, or PGE directs, an exchange at another time; provided, however, that a customer request for an exchange outside the Contractor's standard field hours or on a weekend does not, by itself, authorize payment of an after-hours or weekend adder. Any such adder is payable only when the Work is expressly authorized by PGE in writing and priced in accordance with the Basis of Payment;

7.3.2. Receiving, managing, tracking, reconciling, and safeguarding PGE-furnished meter inventory;

7.3.3. Exchanging existing meters for new PGE-furnished AMI meters included within the authorized scope, including removing the existing meter, performing a visual and safety inspection of the meter socket and service-entrance equipment, installing the new meter and verifying proper seating and electrical connections, and processing and securing the removed meter for return to PGE;

7.3.4. Performing installation procedures appropriate to each authorized meter form and installation type;

7.3.5. Programming and interrogating each installed meter and endpoint and performing all PGE-required field validation, registration, communication, and post-installation testing, in accordance with PGE's technical specifications and the AMI system supplier's requirements. The Contractor shall verify and document successful endpoint registration and communication with the applicable AMI systems and shall document, report, and resolve unsuccessful registrations, communication failures, validation exceptions, and other conditions requiring follow-up in accordance with the approved Project procedures;

7.3.6. Performing secondary-voltage verification for the meter forms or installation types identified by PGE and recording the results in the applicable installation record. If readings fall outside PGE's specified tolerance, the Contractor shall report the condition to PGE within twenty-four (24) hours through the mutually agreed process and follow PGE's direction for resolution;

7.3.7. Installing tamper tags, lock rings, seals, or other security devices specified by PGE and recording applicable identifiers in installation records when required by PGE;

7.3.8. Recording required installation information, including meter data, work-order information, GPS coordinates, photographs, initial and final meter reads, asset-tracking information, and other records required by PGE. Photographs shall include the existing meter display showing the final read before removal, the new meter display showing the initial read after installation, the socket condition, and meter identification plates, and shall be linked to the work-order record and serve as the basis for resolving meter-reading disputes arising from the exchange. GPS coordinates shall be recorded and linked to PGE's GIS asset records. Field devices used for GPS capture shall be capable of achieving a minimum horizontal accuracy of three (3) meters under normal field conditions; and

7.3.9. Performing quality-assurance and quality-control activities.

**7.3.10. Customer Communications and Customer Service**

7.3.10.1. Managing customer interactions and complaint-resolution activities assigned to the Contractor under this SOW. Contractor personnel shall interact with customers in a professional, courteous, and respectful manner, clearly identify themselves as representatives performing Services on behalf of PGE, and shall not enter customer premises beyond the area reasonably necessary to access the meter location without customer permission. If a customer refuses or objects to meter installation, the Contractor shall document the refusal and promptly notify PGE in accordance with approved procedures and shall not attempt to persuade the customer to accept installation. The Contractor shall not represent or administer a PGE customer opt-out program unless PGE expressly authorizes it in writing. PGE will identify in the work-order data any account designations relevant to the exchange, such as medical-certificate, sensitive-customer, or do-not-contact flags. The Contractor shall follow the designation-specific handling procedures in the approved Customer Experience and Communications Plan;

7.3.10.2. Escalation and Transfer of Customer Contacts to PGE.

7.3.10.2.1. The Contractor's customer-service function shall be the first point of contact for customer inquiries and complaints relating to the Services and shall resolve matters within the Contractor's scope without referral to PGE. The Contractor shall escalate to PGE's Customer Service Center any contact that

(a) involves billing, rates, account status, or other matters outside the Contractor's scope;

(b) involves a customer who requests to speak with PGE, refuses installation, or raises an opt-out, medical-certificate, or accessibility concern;

(c) involves a safety hazard, a threat of harm, property damage, or an allegation of misconduct by Contractor personnel; or

(d) involves an issue that remains unresolved after the Contractor's first attempt at resolution.

7.3.10.2.2. During PGE's published Customer Service Center hours, escalations shall be made by warm transfer, in which the Contractor's representative remains on the line, introduces the customer to the PGE representative, and summarizes the customer's identity, service address, the reason for the contact, and any actions already taken before disconnecting. The Contractor shall not cold-transfer a customer, provide a customer only with PGE's general telephone number, or place a customer in a PGE queue without an introduction. PGE will provide the Contractor with a dedicated transfer number or route, the applicable hours, and the information PGE requires to be conveyed at transfer, and may revise these upon notice.

7.3.10.2.3. Outside those hours, or if a warm transfer cannot be completed, the Contractor shall take the customer's information, advise the customer that PGE will contact them, and submit the escalation to PGE through the mutually agreed process by the start of the next Business Day, except that safety-related matters shall be escalated immediately in accordance with the unsafe-conditions requirements of this SOW. The Contractor shall record each escalation, including the date, time, reason, receiving PGE representative or reference number, and disposition, and shall report escalation volumes and reasons as part of the weekly status report; and

7.3.10.2.4. PGE and the Contractor shall document the transfer procedure, scripts, and contact information in the Customer Experience and Communications Plan before customer contact begins.

### 7.3.11. Personnel Identification and Vehicle Signage

Contractor personnel performing customer-facing Services shall comply with the identification, badge, logo-wear, vehicle-signage, and related customer-facing requirements established by the Master Agreement and applicable PGE standards and procedures. Contractor shall ensure that personnel interacting with customers are readily identifiable as performing Services on behalf of PGE.

7.3.12. Maintaining a customer-service function for inquiries and complaints relating to the Services. The customer-service function shall:

- Maintain a dedicated telephone number, including toll-free service if required by PGE, at a minimum from 8:00 a.m. to 6:00 p.m. Pacific time Monday through Friday, or such other hours as approved in the Customer Experience and Communications Plan, with voicemail at all other times and callbacks no later than the next Business Day;

- Maintain any additional communication channels approved by PGE;
- Provide English and Spanish language support and any additional language-support requirements identified by PGE;
- Record customer inquiries and complaints, actions taken, escalation status, and resolution status;
- Report complaints to PGE within four (4) Business Hours after receipt; and
- Immediately escalate matters involving safety, threatened harm, significant service disruption, regulatory inquiry, media inquiry, or other situations identified by PGE as requiring immediate attention;

7.3.13. Handling customer claims for damage arising from the Services, including recording each claim (claimant, address, date, nature of the claim, and Contractor personnel involved) in a claim log accessible to PGE, immediately reporting to PGE any claim alleging personal injury, responding to and resolving valid claims promptly at the Contractor's expense, accepting claims referred by PGE through PGE's standard process, and cooperating fully in PGE's investigation of any complaint or claim made to PGE or the Oregon Public Utility Commission relating to the Services;

7.3.14. Identifying, documenting, and reporting unsafe conditions, service issues, suspected meter tampering, unauthorized energy diversion, theft-of-service indicators, inventory discrepancies, and other field observations requiring PGE review. If an installer encounters an unsafe condition at a service point, including damaged meter sockets, exposed wiring, evidence of electrical hazard, aggressive animals, or environmental hazards, the installer shall not perform the installation, shall document the condition with photographs and a description, shall notify PGE, and shall proceed to the next service point; PGE will determine the remediation path.

The Contractor shall not repair customer-side or PGE-side service equipment, including damaged service-entrance equipment, code violations, or grounding deficiencies, except Minor Electrical Repairs performed under an authorization issued under Section 6.3 and approved by PGE for the specific service point. Suspected meter tampering, energy diversion, or theft of service shall be reported to PGE within four (4) hours of discovery; the installation shall be completed if safe to do so; and Contractor personnel shall not confront the customer or discuss the evidence with the customer. PGE will conduct all theft-of-service investigation and enforcement.

The Contractor shall document such conditions with photographs and supporting field observations, shall not disturb evidence unnecessarily or conduct investigations beyond the scope of the Services, and shall follow PGE direction regarding escalation, site security, customer notification, and further response activities. Upon identifying an unsafe condition that presents an immediate threat to public safety, employee safety, customer safety, or system reliability, Contractor personnel shall first contact 911 if the condition requires immediate emergency response, in accordance with Section 8.3, and shall then immediately notify PGE Dispatch and the designated PGE emergency contact by telephone. Contractor personnel shall remain at the site until relieved or released by PGE, and shall provide written documentation of the condition within twenty-four (24) hours, unless otherwise directed by PGE.

If Contractor Work causes damage that requires a safety disconnect, Contractor personnel shall immediately notify PGE Dispatch, shall remain on site until relieved or released by PGE, and shall support PGE's management of the disconnect, restoration, and customer communication; the Contractor shall not perform the disconnect or restoration unless directed by PGE;

7.3.15. Performing corrective and warranty Work required by this SOW and responding to warranty service requests within two (2) Business Days unless otherwise directed by PGE;

#### 7.3.16. Customer Notification Letters

Prior to commencement of installation activities within a deployment zone, PGE will determine whether advance customer notifications are required and, if required, will determine the content, format, timing, and method of such notifications.

Contractor shall provide PGE with deployment schedules, work-zone information, and other reasonably requested information sufficiently in advance to support customer-notification activities.

Contractor shall promptly notify PGE of material changes to deployment schedules that could affect planned customer communications.

Contractor shall provide copy, imagery, frequently-asked-questions content, and other assets reasonably requested by PGE for a PGE-hosted Project web page and related digital channels, and shall provide updates as deployment information changes. PGE will host, approve, and publish all such content.

7.3.17. Distributing PGE-approved customer notification materials, including door hangers, following successful and unsuccessful installation attempts, and maintaining records of such distribution and reporting such distribution as part of daily production reporting.

For successful installations, Contractor shall distribute PGE-approved materials notifying the customer that the meter exchange has been completed and providing applicable customer-service contact information.

For unsuccessful installation attempts, Contractor shall distribute PGE-approved materials identifying the purpose of the visit, providing applicable follow-up or scheduling information, and providing customer-service contact information.

7.3.18. Scheduling and managing revisits for missed appointments, inaccessible meters, corrective Work, and other follow-up activities. Unless otherwise approved by PGE, the Contractor shall make a minimum of two (2) documented attempts to obtain access at the premises, together with at least two (2) telephone or other contact attempts where a customer telephone number is available, at least one of which shall be outside normal working hours, before escalating the location to PGE for further direction. The Contractor shall develop and maintain a PGE-approved Meter Access Plan defining return-visit scheduling, advance notification, customer-appointment procedures for inaccessible locations (including inside meters, locked enclosures, and gated properties), and the escalation path for persistently inaccessible meters, and shall coordinate with PGE on any situation requiring customer notification, service-disconnection notice, or other utility intervention to gain access. The Contractor shall maintain records of all access attempts and customer interactions. A work order for which the attempt process has been completed without a successful exchange shall be returned to PGE as Unable to Complete ("UTC") with the applicable outcome code. The Contractor shall target a UTC rate of no more than three percent (3%) of completed work orders (successful exchanges plus UTCs), and UTCs that have completed the attempt process are compensable as provided in Attachment I;

7.3.19. Coordinating authorized deployment activities with PGE, PGE's meter shop, the AMI system supplier, and other Project stakeholders;

##### 7.3.19.1. Media and Public Communications

Contractor shall promptly refer all media inquiries, public-information requests, and requests for public comment regarding the Project to PGE and shall follow PGE's escalation procedures. Public statements, publications, advertising, publicity, endorsements, and use of PGE's name or logo shall be governed by the Master

Agreement. The Contractor shall support PGE's communications team, as requested, with deployment information for community meetings and local-government notifications.

7.3.20. Receiving, acknowledging, scheduling, tracking, and reporting priority Work assignments issued by PGE within the authorized scope, including meter failures, safety-related Work, and other Work identified by PGE. Unless otherwise directed by PGE, routine priority Work shall be incorporated into the Contractor's schedule within two (2) Business Days and emergency assignments shall be addressed in accordance with timelines established by PGE; and

7.3.21. Separately identifying and tracking base residential Services and all authorized optional Services, including Minor Electrical Repairs. Separate tracking shall include work orders, quantities, meter forms, installation types, labor classifications, inventory records, installation records, quality results, acceptance status, permit and inspection records, and invoiced amounts.

The Contractor shall not perform optional meter Services unless expressly authorized under Section 6.3. Contractor personnel assigned to optional meter Services must satisfy all qualifications, licenses, certifications, experience, and training requirements applicable to the authorized meter form and installation type.

### 7.4. Task 4 – Reporting, Quality Assurance, and Project Administration

The Contractor shall provide ongoing Project administration, quality assurance, and performance reporting throughout the Project, including:

7.4.1. Maintaining deployment schedules, production forecasts, and work-zone implementation plans;

7.4.2. Preparing and submitting weekly status reports. Weekly status reports shall include, at a minimum:

- Planned versus actual installations by work zone, meter form, and crew;
- Cumulative deployment progress and projected completion status;
- First-attempt success rate and reasons for unsuccessful attempts;
- Staffing levels and material changes in workforce composition;
- Inventory status and reconciliation activities;
- Customer-service metrics and complaint activity;
- Quality-audit results and installation-error metrics;
- Safety incidents, near-misses, and escalations;
- Open risks, issues, corrective actions, and status of outstanding deficiencies;
- Priority Work assignments; and
- A two-week look-ahead schedule.

7.4.3. Tracking and reporting planned versus actual production rates, work-zone progress, crew assignments, projected completion dates, and other approved performance metrics;

7.4.4. Managing inventory reconciliation activities and maintaining installation, deployment, asset-tracking, and Project records required under this SOW;

7.4.5. Preparing work-zone completion reports and other reports required by PGE;

7.4.6. Submitting a monthly safety report summarizing hours worked, incidents, near-misses, injuries, and corrective actions, with copies of any Oregon OSHA injury and illness reports (Form 801) filed during the month;

7.4.7. Participating in Project meetings and coordination activities;

7.4.8. Providing PGE access to dashboards, reports, and performance-tracking information sufficient to monitor deployment progress and Contractor performance;

7.4.9. Implementing and maintaining data-quality controls designed to minimize data-capture and data-entry errors, including validation procedures, quality reviews, error tracking, and corrective-action processes, including barcode or RFID scanning of meter serial numbers, automated field-validation checks, required photographic documentation, and Contractor supervisor review of completed work orders before submission;

7.4.10. Reporting unresolved endpoint communication failures, installation exceptions, validation deficiencies, and other conditions requiring PGE action;

7.4.11. Separately reporting and tracking base residential Services and any optional meter Services authorized by PGE, by meter form and installation type.

**7.4.12. Installation Performance, Retraining, and Corrective Action**

If audits, inspections, installation records, customer complaints, or other performance data indicate that an installer's Work does not comply with this SOW, the Contractor shall promptly remove the installer from independent production work and provide retraining and corrective action as appropriate.

The installer shall not resume independent installation activities until the Contractor has documented successful completion of the required retraining and demonstrated competency in the applicable installation procedures.

If retraining does not resolve the identified deficiencies, the Contractor shall reassign or replace the installer. All costs associated with retraining, reassignment, replacement, audits, corrective Work, and correction of deficient Work shall be borne by the Contractor.

PGE may require documentation demonstrating completion of retraining, corrective action, and competency verification.

**7.4.13. Installation Error Management**

The Contractor shall maintain and implement procedures for promptly identifying, investigating, correcting, tracking, and preventing installation errors, including:

- Incorrect meter installation or service-point assignment;
- Meter or endpoint programming errors;
- Errors in meter, endpoint, asset, or serial-number records;
- Incomplete or inaccurate installation documentation;
- Missing or inadequate photographic records;
- GPS-data errors;
- Tamper-tag, lock-ring, or seal deficiencies;
- Endpoint registration or communication failures;
- Incorrect meter reads;
- Incomplete work orders; and
- Other failures to comply with installation, testing, validation, or documentation requirements.

The Contractor shall promptly correct Contractor-caused installation errors at no additional cost to PGE and shall track each error by installer, crew, work zone, date, error category, corrective action, and resolution status. Completed corrective or go-back Work shall be subject to

verification sufficient to confirm that the identified deficiency has been corrected before the applicable work order is closed.

Each installation requiring return field Work shall be identified in the Contractor's work-management system as corrective or go-back Work and linked to the original work order and installation record. The record shall identify the reason for the return visit, date the deficiency was identified, source of identification, required corrective action, date corrective Work was completed, personnel performing the corrective Work, and final verification status. Corrective or go-back Work shall be separately identifiable from initial installation activity in Contractor reporting.

### 7.4.14. Warranty and Corrective Work

The warranty period applicable to each installation shall be the warranty period established in the warranty provisions of the Master Agreement.

All costs associated with investigating, correcting, retesting, documenting, and closing out defects, errors, omissions, installation deficiencies, warranty claims, and other nonconforming Work attributable to the Contractor shall be included in the Contract prices and shall not be separately charged to PGE.

Corrected Services shall remain subject to the warranty provisions of the Master Agreement.

### 7.4.15. Installation Error Rate

The Contractor shall maintain an installation error rate of no more than one-tenth of one percent (0.1%) for each applicable measurement population and reporting period established in the Deployment Design Document. At a minimum, the methodology shall address Project-wide results and results by installer, crew, route, work zone, meter form, installation type, and weekly installation population. The error-rate methodology shall be approved by PGE and documented in the Deployment Design Document and shall identify:

- Included installations;
- Measurement period;
- Included error categories;
- Treatment of multiple errors on a single installation;
- Source data;
- Treatment of corrected errors; and
- Any approved exclusions.

Installation-error metrics shall be reported as part of the weekly status report.

### 7.4.16. Contractor Quality Audits

The Contractor shall independently select a statistically valid random sample comprising at least one percent (1%) of the installations completed during the applicable week and shall conduct weekly internal quality audits of the selected installations. The Contractor shall document the sampling methodology used and make the methodology and sample-selection records available to PGE upon request.

The audit sample shall be reasonably distributed among installers, crews, work zones, meter forms, installation types, and installation dates. The Contractor shall not exclude an installation from the random sample solely because the installation has already been corrected or identified as potentially deficient. Field quality audits shall be performed as soon as practicable following

installation and, unless PGE approves otherwise, no later than five (5) Business Days after the applicable installation.

At a minimum, each field quality audit shall include a visual inspection of the completed installation and a review of the associated installation and work-order records. The audit shall evaluate, as applicable:

- Proper meter installation and seating;
- Correct meter form and installation type;
- Meter and endpoint programming;
- Successful endpoint registration and communication;
- Meter serial number and asset-record accuracy;
- Initial and final meter-read accuracy;
- Tamper-tag, lock-ring, and seal installation and integrity;
- Required photographic documentation;
- GPS-coordinate capture and accuracy;
- Secondary-voltage verification, when required;
- Work-order completeness and accuracy;
- Compliance with applicable customer-interaction requirements; and
- Compliance with PGE-approved installation procedures.

PGE may observe or accompany the Contractor's audit personnel during field audits upon reasonable notice. PGE's participation in or observation of an audit does not relieve the Contractor of responsibility for the quality or conformity of the Services.

### 7.4.17. Escalated Audit Sampling

If the Contractor's audit results identify an installation error rate exceeding one-tenth of one percent (0.1%) for any installer, crew, route, work zone, meter form, installation type, or weekly installation population, the Contractor shall increase the applicable audit sample to at least five percent (5%) of the affected installation population.

The Contractor shall continue expanding the audit sample as reasonably necessary to determine the extent and cause of the errors. The expanded audit shall continue until:

1. The applicable error rate returns to one-tenth of one percent (0.1%) or below;
2. The Contractor demonstrates, to PGE's reasonable satisfaction, that the affected installation population has been identified and corrected; or
3. All installations within the affected population have been audited.

The Contractor shall develop and implement a corrective-action plan addressing the identified errors, their root causes, affected installations, required corrective Work, responsible personnel, and schedule for completion.

All expanded audits, corrective Work, retraining, and related activities required because of Contractor-caused errors shall be performed at no additional cost to PGE.

### 7.4.18. PGE Quality Audits

PGE may conduct or arrange field audits, data audits, record reviews, or inspections of completed installations at any time during the term of this SOW.

The Contractor shall provide PGE with reasonable access to installation locations, installation records, work orders, photographs, GPS records, programming and interrogation results, audit

records, personnel qualification records, and other supporting information necessary for PGE to evaluate compliance with this SOW.

PGE's audits, inspections, reviews, acceptance, or failure to identify a deficiency do not relieve the Contractor of responsibility for complying with this SOW or correcting deficient Work.

#### 7.4.19. Weekly Quality Audit Reports

The Contractor shall submit a weekly quality audit report to PGE no later than Tuesday of the following week, unless PGE approves a different reporting schedule.

Each weekly quality audit report shall include:

- Number of installations completed during the reporting period;
- Number and percentage of installations audited;
- Description of the sampling methodology;
- Audit results and pass/fail rates;
- Installation error rate;
- Results categorized by installer, crew, work zone, meter form, installation type, and error category;
- Identified deficiencies and affected installations;
- Root-cause analysis for recurring or systemic deficiencies;
- Corrective actions completed or planned;
- Personnel removed from independent production work or assigned to retraining;
- Expanded audit sampling initiated or completed;
- Status of outstanding corrective Work;
- Trend analysis; and
- Matters requiring PGE direction or assistance.

PGE and the Contractor shall review quality audit results during regularly scheduled Project coordination meetings. The Contractor shall promptly implement corrective actions necessary to remedy identified deficiencies and prevent recurrence.

Reports addressing optional meter Services must separately identify the applicable meter forms, quantities, costs, installation records, quality results, and performance metrics.

### 7.5. Task 5 – Zone Closeout and Final Project Closeout

The Contractor shall identify inaccessible meters, deferred Work, failed installations, unresolved deficiencies, and other outstanding items remaining within a completed work zone. Such items shall be documented and transferred to PGE through a formal handoff process as part of work-zone closeout activities. PGE and the Contractor shall jointly review work-zone completion status before final work-zone closeout.

The Contractor shall complete Project closeout activities, including:

7.5.1. Preparing zone completion reports;

7.5.2. Resolving identified deficiencies and punch-list items;

7.5.3. Completing inventory reconciliation and asset-handoff activities;

7.5.4. Delivering final Project records, installation documentation, and supporting files;

7.5.5. Preparing final deployment and closeout reports;

7.5.6. Transferring all required data and records to PGE; and

7.5.7. Supporting final acceptance of the Deliverables and completion of Contract closeout activities.

7.5.8. **Work-Zone Acceptance Criteria.** PGE will accept each work zone against minimum thresholds for:

(a) percentage of meters within the zone successfully exchanged;

(b) AMI network communication success rate for installed meters;

(c) data accuracy and work-order completeness;

(d) substantiated customer complaint rate;

(e) quality-audit pass rate; and

(f) resolution of all identified deficiencies.

The thresholds shall be documented in the approved Deployment Design Document. PGE will complete its work-zone acceptance review within thirty (30) calendar days after receiving the Contractor's written notice of work-zone completion, consistent with the Deliverable review period in Section 11. PGE may conditionally accept a work zone subject to a documented list of outstanding items and a resolution timeline; final acceptance of the zone will not be granted until those items are resolved to PGE's satisfaction. Installations within a work zone are subject to these verification and acceptance requirements for purposes of Section 12.3.

## 8. RESOURCE PLAN

### 8.1. General

This SOW shall be supported by the Key Personnel identified below in the roles and at the levels of effort stated in the Contractor's accepted Resource Plan. Each identified individual is a "Key Person," and the identified individuals are collectively the "Key Personnel." The Contractor shall designate a Project Manager who shall serve as the primary point of contact for PGE and who shall have authority to make day-to-day operational decisions on behalf of the Contractor. The Project Manager shall participate in recurring Project coordination meetings and weekly status meetings as reasonably requested by PGE. PGE may request replacement of Key Personnel, including the Project Manager, if PGE reasonably determines that such replacement is necessary to support successful performance of the Services.

[Insert Name of Key Person] – [Insert a brief description of the Key Person's role]

### 8.2. Staffing Composition

The Contractor shall maintain sufficient qualified personnel to perform the base residential scope in accordance with the approved Project Schedule. Before performing Work on PGE's behalf, all personnel assigned to the Services shall satisfy the drug-screening, criminal-background-check, and training requirements of Section 4 (Performance Standard) of the Master Agreement and PGE's Contractor Behavior Requirements. The Contractor shall immediately remove from the Services any individual who does not satisfy those requirements and shall provide certification of compliance to PGE upon request.

#### 8.2.1 IBEW Representation Requirements

As a condition precedent to commencement of field Work, and throughout performance of the Services, all personnel performing routine AMI meter exchange services under this SOW shall be represented by IBEW Local 125 and covered by an applicable collective bargaining agreement or project-specific labor agreement acceptable to PGE.

Routine AMI meter exchange services may be performed by qualified Meter Installers, Meter Technicians, Utility Workers, Field Service Representatives, or comparable represented classifications, consistent with the historical Meter Installer model utilized by PGE for prior AMI deployments.

Any work requiring electrical licensure or other specialized qualifications under applicable law, regulation, utility standards, safety requirements, labor agreements, or Project procedures shall be performed only by appropriately licensed and qualified personnel. The Contractor shall maintain procedures for identifying and escalating such work and ensuring it is assigned to appropriately licensed and qualified personnel.

Unless the Contractor is already a signatory to an applicable collective bargaining agreement with IBEW Local 125 at Contract Award, the Contractor shall deliver to PGE, within ninety (90) days after the Effective Date and in any event before commencing field Work, a signed collective bargaining agreement or project-specific labor agreement with IBEW Local 125 covering wages, benefits, work practices, and other conditions for the personnel described in this Section. Failure to deliver such an agreement within that period constitutes a material breach of this SOW. The requirements of this Section apply equally to subcontractor personnel performing routine AMI meter exchange services.

If PGE authorizes Minor Electrical Repairs under Section 6.3, such repairs shall be performed only by Licensed Electricians represented by the IBEW and covered by a collective bargaining agreement with the IBEW local union having jurisdiction over the work at the applicable service location. The Contractor is responsible for determining the applicable IBEW local union or unions and resolving any jurisdictional questions with the IBEW. Before performing any Minor Electrical Repair, the Contractor shall provide PGE with license verification and evidence that the Contractor or its electrical subcontractor is a signatory to the applicable IBEW agreement for the work zone in which the repair is authorized. Jurisdictional determinations or disputes do not entitle the Contractor to additional compensation or schedule relief.

If PGE authorizes other optional meter Services, the Contractor shall provide appropriately qualified personnel within the mobilization or response period stated in the applicable written authorization. Such personnel shall possess the applicable experience, licenses, certifications, technical training, safety training, and meter-form qualifications required by PGE and applicable law.

The Contractor shall maintain sufficient Licensed Electrician capacity to complete authorized Minor Electrical Repairs within the timeframe established in the Deployment Design Document. Personnel performing Minor Electrical Repairs must satisfy the applicable licensing, verification, and IBEW representation requirements of this Section 8.2.1.

PGE's evaluation or acceptance of proposed personnel does not authorize optional Services. Optional Services may commence only upon PGE's written authorization under Section 6.3.

### 8.2.2 Davis-Bacon Prevailing Wage Requirements

Routine AMI meter exchange Services that do not involve rewiring, electrical connection changes, upgrades, or other construction, alteration, or repair work are not subject to Davis-Bacon requirements.

Minor Electrical Repairs involving rewiring, electrical connection changes, or other work constituting construction, alteration, or repair and requiring the use of laborers or mechanics shall be subject to applicable Davis-Bacon requirements. For such covered work, the Contractor and its subcontractors shall pay each laborer and mechanic not less than the applicable prevailing wage and fringe benefits for the classification of Work actually performed, as established by the U.S. Department of Labor wage

determination applicable to the geographic location and type of construction where the Work is performed.

The Contractor and its subcontractors shall comply with all applicable Davis-Bacon labor standards, wage determinations, certified payroll and recordkeeping requirements, contract clauses, subcontractor flow-down requirements, and other federal labor requirements set forth in Exhibit B to the Master Agreement or otherwise incorporated into the Contract.

### 8.3. Communications and Contact Requirements

The Contractor shall maintain reliable communications capability for personnel performing the Services and shall provide a designated primary point of contact available during normal working hours. The Contractor shall also maintain an after-hours emergency contact and notification procedure for urgent operational, safety, service, or customer matters requiring immediate attention. In the event of a life-threatening emergency or other condition requiring immediate emergency response, Contractor personnel shall contact 911 before following applicable PGE and Contractor notification and escalation procedures.

The Contractor shall ensure that vehicles used to perform the Services are properly licensed, insured, maintained, and operated in accordance with applicable law, clearly marked with PGE-approved identifying signage, and maintained in a clean and professional condition.

Current contact information for the Contractor's primary and emergency contacts shall be provided to PGE and kept current throughout the term of the SOW.

### 8.4. Key Person Removal

In the event a Key Person is removed from the Project, the following conditions shall apply:

- **Planned Removal:** The replacement individual shall shadow the departing Key Person for a minimum of two (2) weeks at no additional cost to PGE.
- **Unplanned Removal (Without Notice):** The replacement Key Person's transition and onboarding time during the first two (2) weeks following assignment shall not be billable to PGE.
- **Reassignment Restrictions:** The Contractor may not delegate or reassign a Key Person's responsibility without PGE's prior written approval.
- **Qualification Review:** PGE reserves the right to review the qualifications of any proposed replacement Key Person prior to approving or rejecting any such change.

### 8.5. Subcontractors

The Contractor shall not subcontract any portion of the Work under this SOW without PGE's prior written approval. Any request to use a subcontractor shall identify the subcontractor, the scope of Work to be subcontracted, and the qualifications of the subcontractor. PGE reserves the right to reject any proposed subcontractor.

## 9. DATA EXCHANGE

The Parties shall exchange the data and information identified below as necessary to perform the Services and fulfill the requirements of this SOW. The Parties acknowledge that the specific format, transfer protocol, frequency, and system interfaces may be further refined during Project planning and documented in the Deployment Design Document.

### 9.1. PGE Data

PGE shall provide the Contractor with the following data and information reasonably necessary to perform the Services, including:

9.1.1 Customer service addresses and service point information.
9.1.2 Existing meter inventory and meter attribute data.
9.1.3 Meter form, type, and configuration information.
9.1.4 Access instructions and known site-specific considerations, including flags for nonstandard metering configurations such as net metering or bidirectional registers.
9.1.5 Billing-read blackout dates by Meter Route and read cycle; expected high and low read values for each meter to support final-read validation; and account designations, special-handling codes, and PGE-held customer keys or access codes relevant to the exchange.
9.1.6 Work-zone definitions and deployment sequencing information.
9.1.7 PGE installation standards, policies, procedures, and safety requirements.
9.1.8 AMI meter technical specifications and programming requirements.
9.1.9 Customer communication materials approved for deployment activities.
9.1.10 Inventory shipment and meter allocation information.
9.1.11 Data interface requirements applicable to PGE systems, including the applicable Customer Information System (CIS), Geographic Information System (GIS), AMI head-end systems, and other systems identified during Project planning. Such other systems may include the Outage Management System and PGE enterprise systems such as asset management (Maximo), network GIS (IQGeo), network design (Neara), Customer-to-Meter (Oracle Utilities C2M), and work management (PowerTrack).
9.1.12 Meter population data by form and installation type for the authorized scope;
9.1.13 Identification of meter forms and installation types included in each assigned work zone;
9.1.14 Separate work orders or other identifiers distinguishing base residential Services from optional meter Services; and
9.1.15 Additional technical requirements applicable to each authorized optional meter form or installation type.

**PGE Responsibilities.** In addition to the data identified above, PGE will:

(a) furnish AMI meters and communication modules pre-configured and bar-coded in accordance with the AMI system supplier's specifications, together with tamper tags, seals, lock rings, lock-ring keys, and customer keys, and provide an electronic shipment file identifying serial numbers and quantities before each delivery;

(b) provide the deployment sequencing, Meter Route, read-cycle, and blackout-date information needed to prepare and maintain the Deployment Design Document;

(c) provide orientation and train-the-trainer support on PGE meter types, the AMI system supplier's technology, PGE safety and customer-handling procedures, and recognition of tampering, including sample meters and examples of tampered meters, and access to a PGE training facility when available;

(d) provide dispatch and emergency support during the Contractor's standard field hours and the designated PGE emergency contact at other times;

(e) coordinate through PGE account managers any key accounts that require advance notification or appointments;

(f) review and approve customer communication materials, procedures, plans, and other submittals within the review periods stated in this SOW; and

(g) designate the PGE Contract Administrator, Project Manager, and other points of contact identified in this SOW.

The Contractor shall validate PGE-provided customer, meter, and location data against field conditions and shall promptly notify PGE of any material discrepancies affecting installation activities, customer records, asset records, or work-order completion.

PGE shall provide such information in accordance with the Project Schedule, deployment plan, or other mutually agreed schedule. If a delay in PGE's delivery of required data materially impacts the Contractor's ability to meet an approved Deliverable deadline, the Contractor may request a schedule adjustment in accordance with this SOW. Any adjustment affecting scope, compensation, or material Deliverable requirements must be documented through a Change Order.

### 9.2. Contractor Data

The Contractor shall provide all data, reports, records, and other information required by this SOW, including:

- 9.2.1 Deployment schedules and updates.
- 9.2.2 Installation records and completed work order data.
- 9.2.3 Meter programming and endpoint interrogation results.
- 9.2.4 GPS location data and photographic installation documentation.
- 9.2.5 Asset-tracking and chain-of-custody records.
- 9.2.6 Inventory reports and reconciliation data.
- 9.2.7 Quality assurance and audit reports.
- 9.2.8 Safety-incident reports and corrective-action documentation.
- 9.2.9 Customer complaint logs and resolution status.
- 9.2.10 Weekly status reports and performance metrics.
- 9.2.11 Zone completion reports and Project closeout documentation.
- 9.2.12 Data exports required for transfer to PGE systems.
- 9.2.13 Installation records categorized by residential, commercial, industrial, or network meter form, as applicable.
- 9.2.14 Separate production, quality, inventory, and cost reporting for optional meter Services, categorized by meter form and installation type.
- 9.2.15 Personnel qualification and training records applicable to each authorized meter form and installation type.
- 9.2.16 Records identifying meters that are installed, returned, damaged, lost, missing, or otherwise removed from inventory.
- 9.2.17 Customer Experience and Communications Plan, approved outcome-code set and special-handling procedures, business-continuity and disaster-recovery plan, claim log, and monthly safety reports.
- 9.2.18 Minor Electrical Repair records, including service point, condition found, repair performed, materials, electrician name and license number, IBEW local union, customer consent, permit or label number, inspection result, and before-and-after photographs.
- 9.2.19 Any other reports, files, records, or supporting documentation required by this SOW.

The Contractor shall provide completed installation records to PGE on at least a daily basis and shall maintain all Project records in accordance with the record-retention requirements of the Master Agreement and applicable law.

**Additional Contractor Data, if any:** Any additional Contractor-provided data expressly agreed upon by the Parties at Contract Award will be identified in the Project Schedule, Deployment Design Document, or another SOW attachment. No additional material Deliverable obligation shall be imposed except through the Change Order process required by this SOW.

## 10. ESCALATION PROCESS

**10.1.** PGE and the Contractor shall maintain ongoing communications and participate in meetings during PGE's normal business hours, at times mutually acceptable to both Parties, throughout the SOW term.

**10.2.** If an issue arises that requires the other Party's attention and cannot be resolved by the day-to-day Project team, the issue shall be documented and escalated in accordance with the following Escalation Matrix:

| Escalation Level | PGE Representatives | Contractor Representatives | Escalation Trigger |
|---|---|---|---|
| **Level 1** | (To be detailed at Contract Award) | (To be detailed at Contract Award) | The issue cannot be resolved by the day-to-day Project team. The issue shall be documented and submitted with a requested resolution date. |
| **Level 2** | (To be detailed at Contract Award) | (To be detailed at Contract Award) | The issue remains unresolved as of the later of: (a) the requested resolution date; or (b) the end of the eighth (8th) Business Day after the issue was first submitted to the Level 1 Representatives. |
| **Level 3** | (To be detailed at Contract Award) | (To be detailed at Contract Award) | The issue remains unresolved by the end of the ninth (9th) Business Day after the issue was first submitted to the Level 2 Representatives, and a disagreement between PGE and the Contractor persists. |

## 11. DELIVERABLES AND ACCEPTANCE CRITERIA

**11.1.** The Contractor shall provide the Deliverables described in the table below. The final due dates will be established at Contract Award based on PGE's requirements, the Contractor's proposed schedule, and any schedule revisions agreed upon during Contract negotiations. The agreed-upon dates will be inserted into the table below before execution of the SOW.

**11.2.** For purposes of the acceptance procedures in this Section 11, "Deliverables" means the five numbered Deliverables identified in the table below. Except for the comprehensive, integrated baseline Project Schedule included in Deliverable 1, routine Project Schedule updates, meeting agendas, meeting summaries, weekly status reports, zone completion reports, working files, installation records, and other supporting work products required elsewhere in this SOW are contractual work products but are not separately payable Deliverables unless expressly identified in Attachment I.

**11.3.** Payment for meter installation and deployment Services shall be made in accordance with Attachment I and the Basis of Payment provisions of this SOW.

| # | Deliverable | Due Date |
|---|---|---|
| 1 | **Project Planning and Deployment Design Package**. Includes the Project Charter, the Deployment Design Document, the comprehensive, integrated baseline Project Schedule required under Section 7, Project controls, staffing plan, deployment sequencing strategy, communications plan, escalation procedures, risk management approach, and quality management plan. | Within sixty (60) calendar days after the Effective Date. |

| | | |
|---|---|---|
| 2 | **Mobilization and Operational Readiness Package**. Includes approved procedures, training records, facility-readiness documentation, inventory-management procedures, work-management-system configuration and testing results, integration-testing results, and documentation demonstrating readiness for PGE's authorization to commence production deployment.<br><br>If optional meter Services are authorized, the package must separately demonstrate readiness for each applicable meter form and installation type. | (To be detailed at Contract Award) |
| 3 | **Deployment Execution and Zone Completion Deliverable**. Includes completion of the authorized meter-installation Services required under this SOW, submission of required work-zone completion reports, resolution of identified deficiencies, delivery of installation records and asset-tracking data, and achievement of applicable acceptance criteria.<br><br>Records and reporting for optional meter Services, if authorized, must be separately identified by meter form and installation type.<br><br>Progress payments for deployment activities shall be made in accordance with Attachment I and are not dependent upon final completion of this Deliverable. | (To be detailed at Contract Award) |
| 4 | **Final Closeout Package**. Includes the final deployment report, inventory reconciliation, chain-of-custody records, warranty documentation, documentation of the status and final disposition of all unreconciled, missing, damaged, or otherwise unresolved meter inventory, lessons learned, and all required Project closeout documentation. | (To be detailed at Contract Award) |
| 5 | **Customer Experience and Communications Plan**. Documents the agreed customer journeys, hand-off and warm-transfer procedures, materials inventory and approval workflow, language support, training content, RACI, and escalation paths resulting from the customer experience workshops under Task 1. Due fifteen (15) Business Days after the final workshop; customer-facing field Work shall not commence until the Plan is accepted. | Fifteen (15) Business Days after the final customer experience workshop. |

**11.4.** Upon completing a Deliverable, the Contractor shall submit the Deliverable to the PGE Contract Administrator and provide written notice that the Deliverable is ready for review. The PGE Contract Administrator will review the Deliverable and, within thirty (30) calendar days after receipt, provide one of the following written responses:

**i.** **Acceptance:** PGE will notify the Contractor that the Deliverable has been accepted and is complete;

**ii.** **Rejection:** PGE will notify the Contractor that the Deliverable has been rejected and provide a reasonably detailed explanation identifying the deficiencies or areas requiring correction; or

**iii.** **Extension of Review Period:** PGE may notify the Contractor that additional review time is required and identify a revised review deadline.

**11.5.** Failure by PGE to accept or reject a Deliverable within the applicable review period will not constitute acceptance of the Deliverable. If PGE does not provide a written response by the applicable review deadline, the Contractor may submit written notice requesting a decision. If PGE does not provide a decision within five (5) Business Days after receiving the Contractor's notice, either Party may escalate the matter in accordance with Section 10, Escalation Process.

**11.6.** If PGE rejects a Deliverable, the Contractor shall correct and resubmit the Deliverable within a timeframe agreed upon by the Parties. The Contractor shall correct and resubmit the Deliverable at no additional cost to PGE to the extent the rejection results from the Contractor's failure to comply with this SOW. A request by PGE that materially expands or alters the agreed scope, assumptions, level of analysis, or Deliverable requirements must be addressed through a Change Order executed by authorized representatives of both Parties.

**11.7.** PGE's review or acceptance of a Deliverable does not waive any latent defect, nonconformity, warranty obligation, or other failure to comply with this SOW that was not reasonably discoverable during the applicable review period. The Contractor remains responsible for correcting any such deficiency in accordance with this SOW and the Master Agreement.

**11.8.** If PGE's review period or a correction and resubmission materially affects another approved Deliverable deadline, the Parties will address the affected deadline through the Project Schedule management process. Any adjustment affecting the scope, compensation, or material Deliverable requirements must be documented through a Change Order.

**11.9.** PGE may conditionally accept a Deliverable subject to completion of identified corrective actions, punch-list items, or outstanding deficiencies. Conditional acceptance does not waive the Contractor's obligation to complete such items within the timeframe specified by PGE.

## 12. BASIS OF PAYMENT

### 12.1. Governing Payment Terms

PGE will pay the Contractor for authorized Services completed, documented, verified, and accepted in accordance with this SOW, the Master Agreement, and Attachment I, Basis of Payment.

### 12.2. Contract Amount

The total amount payable under this SOW will not exceed **$[INSERT AMOUNT]** without a Change Order executed by authorized representatives of both Parties. The not-to-exceed amount does not constitute a minimum purchase commitment.

### 12.3. Unit-Priced Services

The Contractor may invoice monthly for authorized unit-priced Services completed during the preceding billing period. Payment will be based on quantities that:

a) Were authorized by PGE;
b) Were completed in accordance with this SOW;
c) Were supported by complete installation, inventory, and work-order records;
d) Passed the applicable verification and acceptance requirements; and
e) Were priced using the applicable fixed unit price in Attachment I.

**Installation Acceptance.** A meter exchange is accepted for payment when:

(a) the meter has been properly installed, meaning the correct meter form and type for the service is installed in the correct orientation, properly seated and sealed, the meter serial number matches the installation record, the final read on the removed meter and the initial read on the installed meter have been captured and either pass PGE's high/low read validation or are supported by a legible photograph of the meter display, and the site is left free of installation debris and damage;

(b) the installation record has been delivered to PGE in the daily electronic transfer; and

(c) PGE's systems have processed the record without exception and acknowledged it in the validation file, confirming that the meter and endpoint are correctly associated with the service point and customer account, that required register and interval data are available to PGE, and that no unresolved Contractor-caused exception exists that would prevent accurate billing. Physical installation alone does not constitute completion of a meter exchange. Acceptance shall not be withheld because of PGE's inability to process the record, validation errors not caused by inaccurate or incomplete Contractor data, or endpoint communication failures not attributable to the installation. If an accepted meter is later found not to communicate and the cause is determined to be improper installation, the Contractor shall correct the installation under the warranty provisions of this SOW and PGE shall receive, on the next invoice, a credit equal to the unit price paid for that exchange.

### 12.4. Separately Priced Deliverables

A formal Deliverable separately priced in Attachment I may be invoiced only after PGE provides written acceptance of that Deliverable under Section 11.

### 12.5. Progress Payments

Monthly payment for completed and accepted meter installations is not conditioned upon final completion of Deliverable 3 or final completion of the applicable work zone.

### 12.6. Optional Services

PGE may exercise all, some, or none of the optional meter Services identified in Section 6.3 and Attachment I. PGE will pay only for optional Services that were authorized in writing before performance, completed in accordance with this SOW, and priced using the applicable fixed unit price in Attachment I.

### 12.7. Separate Tracking

Each invoice and its supporting documentation must separately identify:

a) Base residential Form 2S Services;
b) Optional residential Form 1S Services;
c) Optional residential Form 12S Services;
d) Optional commercial, industrial, and network meter Services;
e) Optional meter acceptance testing;
f) Optional Minor Electrical Repairs;
g) Warranty or corrective Work; and
h) Other separately authorized Services.

### 12.8. No Guaranteed Quantity

PGE does not guarantee any minimum quantity of Services, meter exchanges, work orders, optional Services, or expenditures.

### 12.9. Expenses

Unless expressly authorized in Attachment I or through a Change Order, PGE will not reimburse the Contractor for travel, lodging, meals, transportation, materials, or other out-of-pocket expenses.

## 13. INVOICE INSTRUCTIONS

### 13.1. Submission

The Contractor shall submit invoices to the PGE Contract Administrator and **[INSERT GID02 INVOICE EMAIL ADDRESS]**.

### 13.2. Billing Frequency

Unless PGE approves otherwise in writing, the Contractor shall submit invoices monthly after the end of the applicable billing period.

### 13.3. Required Information

Each invoice must include:

a) Contract number and SOW number;
b) Contractor legal name and remittance information;
c) Invoice number and invoice date;
d) Billing period;
e) Total not-to-exceed Contract amount;
f) Previously invoiced amount;
g) Current invoice amount;
h) Remaining authorized Contract balance;
i) Applicable Attachment I line-item number;
j) Description of the Services performed;
k) Applicable work zone, work order, meter form, and installation type;
l) Quantity completed and accepted;
m) Applicable fixed unit price;
n) Extended amount by line item;
o) Separate identification of base residential Services and each category of optional Services, including Minor Electrical Repairs and the applicable meter form and installation type; and
p) Applicable supporting installation, inventory, quality, and acceptance records.

### 13.4. Separately Priced Deliverables

If the invoice includes a separately priced Deliverable, the Contractor must identify the Deliverable and include PGE's written acceptance.

### 13.5. Rejected Invoices

PGE may reject an invoice that is incomplete, inaccurate, unsupported, inconsistent with Attachment I, or includes unauthorized Services. Rejection of an invoice does not constitute rejection of properly performed Services. The Contractor shall correct and resubmit the invoice.

### 13.6. Payment Timing

PGE will pay a proper invoice in accordance with the payment provisions of the Master Agreement.

### 13.7. No Duplicate Billing or Funding

By submitting an invoice, the Contractor certifies that no invoiced cost has been charged to, reimbursed by, or used as cost share under another federal award, contract, grant, cooperative agreement, or funding source. The Contractor shall promptly notify PGE if it identifies an actual or potential duplicate charge or overlapping source of reimbursement.

## 14. PGE CONTRACT ADMINISTRATOR

**14.1.** The Contract Administrator identified below is designated by PGE to act on PGE's behalf and make day-to-day decisions regarding the administration of this SOW. The Contract Administrator does not have the authority to make decisions that alter the terms, conditions, or Deliverables of this SOW. Any such modification must be documented through a Change Order executed by authorized representatives of both Parties.

**14.2.** Contract Administrator: (To be detailed at Contract Award)

## ATTACHMENT I - BASIS OF PAYMENT

Annex B to the Solicitation, as completed by the selected Offeror, revised through any authorized Proposal revision or negotiation process, and incorporated into the executed SOW, will constitute **Attachment I, Basis of Payment**, to this SOW. In the event of a conflict, the order-of-precedence provisions of the Master Agreement will control.