



TOGETHER, WE WILL
CHANGE
THE WAY PEOPLE
USE ENERGY

CLEAResult[®]

**RFQ Response to
Louisiana Public
Service Commission
for a Statewide
Program
Administrator**

SUBMITTED TO:

Kimberly N. O'Brian and
Kathryn H. Bowman
Louisiana Public Service
Commission
602 North Fifth Street
(Galvez Building) (70802)
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SUBMITTED ON:

April 4, 2024



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Kimberly N. O'Brian and Kathryn H. Bowman
Louisiana Public Service Commission
602 North Fifth Street (Galvez Building) (70802)
P.O. Box 91154
Baton Rouge, LA 70821
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Dear Ms. O'Brian and Ms. Bowman:

Please find our response to your Request for Qualifications of Program Administrator for statewide energy efficiency programs for the Louisiana Public Service Commission.

CLEAResult is the largest provider of energy efficiency, energy transition and decarbonization solutions in North America. Since 2003, our mission has been to change the way people use energy. Today, our experts lead the transition to a sustainable, equitable, and carbon-neutral future for our communities and our planet. We meet your minimum qualification requirement to have at least five years of experience with energy efficiency program design, administration, and analysis. We further describe our qualifications in the response attached to this cover letter.

If you have any questions, you can reach out to me at 512.771.3093 or [CLEAResult BD@clearesult.com](mailto:BD@clearesult.com) or chris.pasch@clearesult.com. Thank you in advance for your review and consideration of our RFQ response.

Sincerely,

Chris Pasch
Vice President – Business Development



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Firm Qualifications

Overview of How We Meet Your Minimum Qualifications (Category 1)

CLEAResult has nearly 40 years of experience designing, marketing and implementing energy programs for communities, utilities, businesses and residential energy customers to define and achieve energy efficiency goals. With a current portfolio of more than 190 utility partners and 1,650 energy programs, we have helped save more than 5,200 gigawatt hours of energy and more than 68 million therms annually. With unmatched technical expertise, we have grown to be the industry leader as the largest private company in North America exclusively focused on energy efficiency, demand response, demand-side management, and customer-focused solutions.

We have grown rapidly in recent years to meet the ever-growing and evolving needs of our clients. Our strategic investments strengthen our ability to deliver exceptional services by local experts who understand the nuances of their local markets and regulatory environments. These investments provide our clients with access to proven, industry leading capabilities and next generation technologies. Our goal is to be the one-stop-provider for all the utility’s energy efficiency needs, across all the customer segments a utility might serve.

While our expertise and experience extends across North America, we have deep local roots through local program teams and the relationships they foster in their communities. With a sole focus on energy efficiency, sustainability and conservation, we use our intimate understanding of our clients’ needs and the unique features of their service territories to change the way people use energy.

Through this experience, we can meet your minimal qualifications listed in the RFQ and have worked with the required points of contact as described in **Category 1: Public Utility Commissions and Staff, state or federal agencies, energy efficiency contractors and/or evaluators, public utilities, end-use customers, and energy efficiency working groups.**

Our Capabilities

Our energy experts design, market and implement energy programs across North America. We work with some of the largest and most





complex investor owned utilities, many of whom provide electric and gas service to millions of customers, across state boundaries, and are regulated by multiple state agencies.

We have structured our staff of industry thought leaders into centralized, national teams so that we can effectively share best practice program design and delivery strategies to our clients. We offer a comprehensive suite of energy programs and demand-side management strategies that reduce load requirements for utilities, lower energy bills for customers and minimize communities' impact on the environment. We're changing the way people use energy every day – in every way possible.

Energy Efficiency Program Experience

Residential and Low Income Programs

CLEAResult's residential program portfolio includes hundreds of residential programs for clients across the country. The approaches of our current residential programs include "walkthrough" energy audits, comprehensive energy audits with whole-house diagnostics, home performance with ENERGY STAR, home weatherization services, A/C tune-ups, duct sealing and repair and ENERGY STAR New Homes, Lighting and Appliances implementation for utilities clients. Each program is designed to help utility customers identify energy savings opportunities and implement energy efficiency improvements. We have empowered thousands of lower- and middle-income customers with energy solutions to fit their needs while lowering their energy use and bills each month.

- 30 years' experience in low-income markets
- Established national relationships
- 20 years' experience working with Community Action Agencies
- Leveraged funding with housing commissions, authorities and state weatherization authorities
- Experienced, in-house program delivery teams

These programs feature a variety of home energy program delivery approaches that include:

- Behavioral
- Demand Response
- Direct Install
- Electric Vehicles
- Energy Advisor
- Existing and New Homes
- HVAC
- Low Income



- Multifamily
- Online Audits
- Residential Program Marketing
- Retail
- School Kits
- Solar PV/Hot Water

Commercial and Industrial Programs

CLEAResult has unmatched experience and credentials in the C&I program space, as evidenced by the 900+ C&I programs we currently run on behalf of utilities across North America, completing 30,000+ projects annually. To deliver these programs, we employ regionally based staff members with strong experience in providing outreach and customer engagement, technical support, engineering services for our clients' C&I customers. We have 90+ C&I engineers who also work every day on C&I energy efficiency programs across North America. We combine our deep regional experience with our North American team of specialized industrial experts. Together, our team has helped industrial, commercial, institutional and agricultural organizations use energy more intelligently, pay less and even generate cash flow through strategically timed energy reductions.

Examples of C&I program capabilities we deliver include:

- Prescriptive and custom application processing and technical review
- C&I outreach and marketing
- Customer segmentation and targeting
- National key account management
- Measurement & verification planning and implementation
- Energy studies, audits and facility assessments
- Measure analysis and development
- Quality assurance and quality control inspections
- Whole building/site energy modeling
- Trade ally management
- CoolSaver for Business HVAC tune-ups
- Retro-commissioning (RCx)
- C&I Electrification
- Technical services and consulting
- Energy management strategic planning
- Call center operations and energy advisory services
- Education and training workshops, webinars, tip sheets, case studies, etc.



Small Business and Government Programs

Our Small Business and Government Solutions are designed specifically for small business owners and non-profit organizations. CLEARResult has a comprehensive range of capabilities to meet the needs of these hard-to-reach customers. Our community-based outreach and marketing tactics help customers who lack the time or expertise to identify their energy efficiency opportunities get reliable information and act quickly to improve the energy performance of their facilities. Our team performs facility assessments to identify and recommend cost-effective measures; provides direct install services for quick deployment of no-cost energy savings; and provides enhanced cash incentive offers for more comprehensive energy efficiency improvements installed by a network of qualified trade allies. For programs targeting institutional organizations, such as K-12 schools, school districts, government entities, and higher education facilities, CLEARResult provides more in-depth energy coaching to help enable institutional change and encourage persistent savings and repeat participation. We specialize in helping these end-use customers manage their entire portfolio of facilities and control energy costs through energy master planning, benchmarking, resource conservation management, energy auditing, and efficiency project implementation support. Our innovative approach, designs, and the attention to detail in our construction management and commissioning have helped save our customers millions of dollars.

Ability to Track and Manage and Report Data (Categories 2 and 3 and 11)

Track and Manage Data. CLEARResult's IT solution tracks, manages, and stores program information and all critical fields necessary for project and program management in our flexible and configurable framework which allows us to align eligible products, incentives, program participants, and partners specific to our clients' programs. Our capabilities are further enhanced by the system's ability to provide real-time program data on end-to-end program processes at a high level (e.g., summary KPI dashboard) or at a granular level (e.g., all touchpoints with a specific customer, or pictures taken on-site at each evaluation), allowing for more informed decisions regarding program design, driving the continuous improvement process, and efficiently pulling and providing data for utility partners and other key stakeholders.

Reporting. We provide our clients with regular, detailed documentation regarding progress made toward program design, advance marketing, and any other area critical to the successful implementation of their program(s). We will provide program administration reporting through periodic data extracts from our database. Our reports include data extracts and real-time reports, monthly reports, quarterly business reviews (if applicable), and annual reports. CLEARResult's team will also provide the necessary documentation to support financial tracking and invoicing.



Approach to Operations and Organization (Category 4 and 12)

CLEAResult’s client-centric business structure is organized around geographical regions supported by centralized, national services teams to establish best practice policies and support unified business operations companywide. Our services teams establish best practice policies companywide that are tailored and delivered by our highly qualified local teams. Our local teams provide boots on the ground support for program delivery and operations. We currently operate EE program in Louisiana, and we can have local offices and additional staff in Louisiana as required

EE Program Design (Category 5)

CLEAResult’s approach to planning and designing an energy efficiency program starts with understanding the overall program goals, the marketplace and opportunities to assist our clients in driving higher levels of customer satisfaction and to create and support conditions for market transformation and job creation. We will align our integrated portfolio design and corresponding services at every opportunity with the overarching objectives of our clients to produce long-term cost-effective energy savings in the appropriate sector.

Approach to Data Confidentiality (Category 6)

We employ strict governance for data security and privacy purposes through our policies, plans and standards. We ensure all employees adhere to data/information security guidelines as outlined in:

- Information Security Policy
- Acceptable Use Policy
- Vendor Data Security Policy:
- Data Classification and Handling Standard

Trade Ally Network Experience (Category 7)

We have experience in recruiting, managing, and training a trade ally network for energy efficiency programs for clients across the U.S. and Canada, supporting them with the resources and skill development they need to successfully support the program and grow their businesses as our valued program partners. We have over 40,000 qualified contractor partners participating in our residential programs across the country and more than 10,000 participating in our C&I programs. Mutually beneficial trade ally partnerships are of critical importance for sustained market transformation the successful delivery of energy efficiency programs. Trade allies are an important channel for reaching customers via the one-to-many relationships they hold as businesses in the market and communities served by the program. This is particularly impactful in developing relationships with traditionally disadvantaged or underserved



communities as trade allies have become trusted businesses serving the needs of their local communities.

Experience with EE Payments (Category 8)

Our Integrated Customer Service (ICS) team brings together rebate processing, contact center, training and workforce management and reporting under one integrated customer service structure. This design will streamline the engagement process and create a seamless customer experience from beginning to end. Under this model, customers interact with dedicated, support specialists who will resolve their questions quickly and efficiently. Processing specialists will focus on data entry and quality application review. Their goal will be to turn around rebates accurately and as quickly as possible, so that customers and partners do not have to wait longer than necessary for their rebate incentive. Shared leadership will identify best practices and commonalities, efficiently integrating them throughout the practice. This will eliminate pain points often seen in other delivery models where the contact center and processing teams are not combined.

Experience with Marketing – Branding and Messaging (Category 9)

CLEAR result’s team of 80+ marketing professionals has extensive experience supporting energy programs and has worked previously within Louisiana. In creating materials and through any other marketing services that clients may request from CLEAR result, our team is eager to collaborate with clients to create on-brand and compelling materials to foster awareness and drive demand. Our data-driven and targeted media and marketing strategies lead to measurable customer awareness and behavioral change across diverse demographic groups.

Experience with TRMs (Category 10)

CLEAR result supports our clients’ energy-efficiency initiatives by providing broad technical support for DSM offerings and performing in-depth energy analyses for individual projects. Our work includes investigation and analysis of energy-efficiency technologies and approaches – from energy savings and cost-effectiveness calculations to energy modeling via hourly building simulation, development of work papers for documenting new measures, program technical support and creation of cutting-edge analysis tools. Our general approaches to providing technical services are described as follows.

CLEAR result examines market trends and real-world data to strategically select new measures for specific regions and markets. We conduct market and manufacturer research, calculate potential energy savings, develop work papers, and train CLEAR result and client staff to implement new measures in the field. To develop new measures, CLEAR result engineers first research technologies and select potential



measures. For each measure, they develop a unitized energy savings model, calibrate that model to typical market conditions, and propose terms and conditions that will help ensure savings and customer satisfaction. CLEARresult then proposes the new measure to the appropriate local and regional organizations

Experience Transition and Launches (Category 13)

CLEARresult understands that the program start-up period sets the tone for the entire engagement and is critical to our client’s program performance. Accordingly, we bring rich start-up capabilities mobilized by a dedicated start-up team delivering launch experiences that expedite start-up time and minimize costs and process errors commonly associated with starting new initiatives. Our start-up managers use a robust and customized governance process engaging the program team and the main stakeholders from the beginning. Our start-up standards ensure efficient program deployment, quality of services delivered as soon as we begin work and, ultimately, satisfaction of our utility clients and their customers.



About CLEAResult

CLEAResult is the largest provider of energy efficiency, energy transition and decarbonization solutions in North America. Since 2003, our mission has been to change the way people use energy. Today, our experts lead the transition to a sustainable, equitable, and carbon-neutral future for our communities and our planet.

Our hometown teams collaborate with a diverse network of local partners to deliver world-class technology and personalized services that make it easy for commercial and industrial businesses, governments, utilities and residential customers to reduce their energy use and carbon footprint.

CLEAResult is headquartered in Austin, Texas, and has over 2,400 employees in more than 60 cities across the U.S. and Canada. CLEAResult is majority owned by TPG through its middle market and growth equity investment platform TPG Growth and its multi-sector global impact investing strategy The Rise Fund.

Explore all our energy solutions at clearresult.com.

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