



Program Administrator to Design and Implement a Statewide Energy Efficiency Program in Louisiana

Request for Qualifications (RFQ) Response to Louisiana Public Service Commission

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Due: 04.04.2024



April 2, 2024

Louisiana Public Service Commission
Attn: Kathryn Bowman
602 North 5th Street
12th Floor
Baton Rouge, LA 70802

Regarding: Louisiana Public Service Commission - Request for Qualifications (RFQ) of Program Administrator

Dear Commissioners and Supporting Staff,

Resource Innovations appreciates the opportunity to submit our qualifications, capabilities, and experience in response to the Louisiana Public Service Commission's (LPSC) RFQ for Program Administrators to design and implement a statewide energy program for Louisiana, Louisiana residents, and Louisiana businesses. Please accept our response as our statement of interest in becoming the LPSC's Program Administrator. Our response demonstrates that we exceed your minimum qualifications and experience, and we look forward to responding to your upcoming RFP.

Resource Innovations' business is focused on transforming and improving the energy marketplace and working with state public service commissions, utilities, and end-use customers to design, administer, and implement programs that reduce and shift electricity and gas consumption. Resource Innovations and companies that are now part of Resource Innovations (such as Nexant and TechniArt) have been delivering efficiency solutions and services since 2000. We work with more than 150 electric and gas utilities in more than 35 states including the administration of programs on behalf of public utility and service commissions and statewide programs in California, Wisconsin (Focus On Energy), and Oregon (Energy Trust of Oregon), and numerous other state organizations and agencies. Resource Innovations is contracted to perform other services directly for the states of: Indiana, Ohio, Florida, and Colorado.

Resource Innovations offers end-to-end capabilities including program design; program budgeting inclusive of administrative budget and incentives to customers or contractors; implementation of programs; customer education and awareness; trade ally (local contractor) network development and management; local workforce development; evaluation and installation of energy savings measures; incentive and rebate fulfillment; and reporting.

We have four full-time employees living and working in Louisiana and will significantly expand our local presence if selected as the LPSC's program administrator. We will prioritize workforce development initiatives for Louisiana residents and will maximize the amount of program funding spent in the state. Resource Innovations is uniquely qualified to help design and administer the Phase II programs on behalf of the LPSC for the following reasons:



- **Experience.** Many of our executives and leaders have more than 25 years of experience working with energy efficiency and demand response programs. Our executive team's experience designing, administering, and delivering energy efficiency and demand response programs is unrivaled in the industry.
- **Engaging local contractors as trade allies in Louisiana.** One of our most successful business models for portfolios similar to this is to train a network of local businesses and help them expand and hire more staff as a result of participation in the programs that we administer.
- **National and regional energy efficiency expertise.** Resource Innovations delivers energy efficiency and demand response programs for electric and gas utilities across the United States, including Texas, Arkansas, and Florida. We bring industry best practices to every engagement and customize them to meet the regional needs of our clients.
- **Best in-class technology platform.** Our industry-leading technology platform tracks and reports for more than 440 programs across the United States. Our technology platform allows us to track important metrics that are critical to administering and measuring program success including data regarding participating businesses and residents, contractors and trade allies, measures, savings, and more.

We look forward to meeting with you to discuss our qualifications, capabilities, and extensive experience prior to RFP release if time allows.

Our Conflict of Interest Statement is provided as Appendix A.

Thank you for considering our qualifications. JP Harper, Senior Vice President, is Resource Innovations' primary point of contact and can be reached at 215-327-0523 or by email at ri.bd@resource-innovations.com.

Sincerely,

A handwritten signature in blue ink that reads 'Lauren Casentini'.

Lauren Casentini
CEO, Resource Innovations

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Statement of Confidentiality

The descriptive materials in this proposal are proprietary and confidential information of Resource Innovations and shall not be disclosed or reproduced, in whole or in part, to any third party or used for any purpose other than to evaluate this proposal or otherwise in connection with the resulting contract, without the prior written consent of Resource Innovations. Resource Innovations maintains all ownership rights to this proposal and the information it contains. Resource Innovations, in accordance with any applicable rules and regulations, shall be entitled to notification of any request for disclosure, and Resource Innovations reserves the right to take any and all action necessary and appropriate to protect the information from release and maintain its confidentiality.

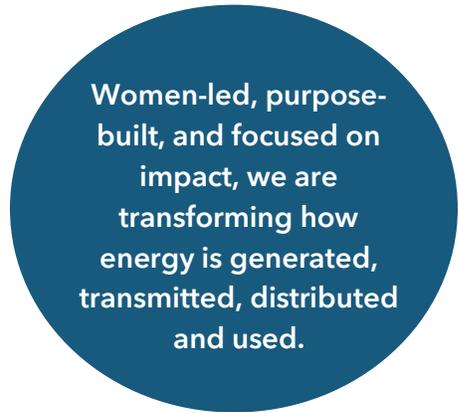
1 Introduction

Resource Innovations is pleased to share how our demonstrated history of designing, implementing, and overseeing energy efficiency programs can support the LPSC as you establish a statewide energy efficiency program in Louisiana. The following is an overview of our experience, our collaborative approach, and a sample of the programs we lead for our diverse clients.

2 Minimum Requirements

2.1 Corporate Qualifications

Resource Innovations is a women-led energy management and consulting firm – purpose-built and focused on impact and driving the material change needed to renew the promise of energy. Our company's deep roots and broad expertise in demand side management (DSM), resource efficiency, market-based technology, policy, and partnerships give us a clear experiential understanding of the increasingly complex and connected challenges our clients are facing with extreme weather events, rising consumer costs, regulatory priorities, and shifting consumer expectations. Our comprehensive suite of services builds on our expertise in energy efficiency, delivering real results that mark real progress toward a more sustainable, economical, and equitable future. We are constantly expanding our portfolio of advanced solutions to help our clients navigate the changing energy market toward a clean energy transition, meeting their sustainability goals, and improving customer satisfaction while realizing the most dollar-for-dollar benefit from energy efficiency programs.



2.2 Experienced Team

Resource Innovations has and will expand a comprehensive team of qualified, experienced, and motivated personnel capable of delivering LPSC’s Statewide Energy Efficiency Program. We are committed to delivering dedicated, in-person service to LPSC, starting with Trent Brackenridge, Senior Vice President of Program Delivery. Trent takes an active role with key clients and will guide the team with his 15 years of experience. This includes his involvement in the design and development of the first energy efficiency programs in Louisiana, starting in New Orleans and then during the first part of the Louisiana Quick Start programs. He understands the importance of designing and delivering programs that positively impact all ratepayers in all parishes. Tara Dennis, Senior Program Manager, will serve as Resource Innovations’ account lead and Program Manager. She will interface with LPSC and coordinate program launch and delivery. Tara has direct experience

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assisting utilities with program transitions and managing customer applications. Tara lives and works in Houston, Texas. Trent and Tara’s resumes are provided as Appendix B.

We have four Customer Service and Rebate Processing Specialists who live in Louisiana and are current customers of local electric and gas utilities. Resource Innovations centralizes certain functional groups to provide exceptional subject matter expertise and value and can leverage more than 24 years of experience delivering residential programs to provide the highest value to LPSC and outstanding service to Louisiana customers.

2.3 Program Experience

Resource Innovations has 24 years of experience designing, administering, implementing, and evaluating energy efficiency programs for states, municipalities, and utilities. As our core business, we offer comprehensive energy efficiency program administration, design, implementation, and evaluation, analysis, and advisory solutions for a rapidly changing energy industry. With turnkey program implementation offerings, we support individual programs targeted at specific sectors, statewide programs, and full portfolios of utility offerings. We support program implementation with management, marketing and outreach, implementation contractor/trade ally management, incentive processing and rebate fulfillment, customer service, and data management and reporting.

“Resource Innovations has served as the backbone of SRP’s Business Solutions programs for more than a decade now. Throughout that time, they have provided topnotch program implementation services with the customer outreach, trade ally management, and engineering support needed to help SRP consistently achieve its goals.”

Nathan Morey
Manager of Program Development and Energy Efficiency, Salt River Project

We help clients across North America achieve their energy efficiency goals through DSM program administration for residential, commercial, and industrial (C&I), agriculture/indoor agriculture, building electrification and electric vehicles (EVs), renewable energy, and energy and water efficiency. We also specialize in flexible load management, market transformation, DSM research, planning and analysis, and grid planning, management, and software. With more than 750 employees across the United States and Canada, we provide software tools, technical expertise, and region-specific knowledge to improve customer engagement, boost operational efficiency, reduce costs, and achieve superior program results. Together, we drive innovation across all market sectors, delivering DSM, demand response, and distributed energy resource (DER) solutions.

We have described example programs throughout our response. Table 1 provides a high-level look at the coverage of our programs related to LPSC’s minimum requirements.

Table 1. Resource Innovations' Qualifications

Program	Administration & Oversight	Program Implementation	Energy Efficiency Design	Analysis of Energy Efficiency Programs
Ameren Missouri's Single-Family Income Eligible and Multifamily Income Eligible & Market Rate Programs	✓	✓		
Salt River Project Standard Business Program	✓	✓	✓	✓
JEA Fleet Electrification Program	✓	✓	✓	✓
California Public Utilities Commission (CPUC) California Market Transformation Administrator	✓	✓	✓	✓
CenterPoint Energy- Retro-Commissioning Program	✓	✓	✓	✓
Dominion Energy VA - Income & Age Qualifying Home Improvement & EnergyShare Weatherization Services	✓	✓	✓	
Santee Cooper - Reduce the Use Energy Efficiency Programs	✓	✓	✓	✓
Nicor Gas - Portfolio Administration	✓	✓	✓	✓
Colorado Energy Office Cannabis Resource Optimization Program (CROP)	✓	✓	✓	✓
Duke Energy - Residential HVAC (Smart\$aver) Program Evaluation				✓
MassSave Rebate Processing	✓	✓		
Multifamily New Construction Building Audits, Energy Modeling, and Certification Support in Utah	✓	✓		✓
Burbank Water and Power - COVID-19 Residential Assistance Program Support Services	✓	✓		
Florida Energy Efficiency and Conservation Act (FEECA) Utilities - Technical Potential Studies				✓
Commonwealth Edison Standard and Small Business	✓	✓	✓	✓

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Examples of programs that demonstrate our ability to administer, implement, and design complex solutions for diverse clients include:

- **Salt River Project - Standard Business Solutions Program (2009 - Present).** Since 2008, Resource Innovations has administered this program for Salt River Project (SRP) in the Phoenix, Arizona metropolitan area. Our turnkey implementation services include program design, outreach to customers and trade allies, education and training for program participants, program support for SRP's account managers, customer service/call center assistance, application processing and incentive fulfillment, due diligence engineering review, and detailed reporting and analysis. Resource Innovations has supported 13,043 standard projects totaling more than \$90,627,616 in rebates and 1,363 GWh of commercial and industrial energy savings.
- **CenterPoint Energy - Retro-commissioning Program (2003-Present).** Resource Innovations designed and is implementing a Retro-commissioning (RCx) Program available to CenterPoint Energy customers in the eastern half of Texas. The program includes program application, investigation, project implementation, and savings verification. Customers receive a performance-based incentive after project verification and a bonus incentive if they complete projects identified in an investigation report within nine months of the findings. We manage a network of 20-30 RCx agents who work with customers and contractors to identify low- and no-cost energy-saving opportunities and capital measures with short paybacks. Between 2007 and 2023, we have helped achieve more than 102 million kWh and more than 19,000 kW of verified energy savings.
- **Dominion Energy Virginia - Income and Age Qualifying Home Improvement Program (2015 - Present) and EnergyShare Program Weatherization Services (2015 - 2023).** The Income and Age Qualifying (IAQ) Home Improvement program helps low-income and age-qualified customers aged 60 or older, disabled veterans, and other disabled individuals (receiving supplemental state or federal support) reduce energy expenses through the installation of common measures such as LED lighting, showerheads, faucet aerators, water line pipe wraps, heat pump replacements, appliances, air sealing and attic insulation. The program is available to qualifying residents in single-family, multi-family, or mobile homes. We provide program design and regulatory support. We also review, process, and approve trade ally and customer applications; qualify, train, and educate trade allies on program processes and tools; inspect customer projects; and issue incentive checks. The greatest program impact is the assistance it gives to vulnerable customers by expanding the reach of state weatherization agencies and trade allies to members of the community who need help the most. Between 2015 and 2021, the programs served more than 37,000 customers and generated 20.5+ million kWh of energy savings.
- **Santee Cooper - Reduce the Use Energy Efficiency Programs (2009-2019).** Resource Innovations supported Santee Cooper, South Carolina's state-owned electric and water authority, by providing program design and implementation services for a suite of residential and commercial energy efficiency programs. The Resource Innovations evaluated market potential study of 2009 was used to identify cost-effective DSM measures and craft a portfolio of offerings tailored to Santee Cooper's territory and customers. What began in 2009 as support of

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commercial offerings expanded in 2013 to incorporate and re-design underperforming residential programs that another vendor administered. After a smooth transition in 2014, Resource Innovations began implementing Santee Cooper's full suite of DSM programs. A solar program was launched in 2017 that was highly successful. We supported Santee Cooper's programs with trade ally recruitment, training, and management; strategic marketing and outreach; due diligence services; portfolio evaluations; project and program level M&V; program tracking and reporting; and program management. By partnering with Resource Innovations, Santee Cooper attained 205 GWh of energy savings for the programs and processed program incentives and rebates for measures totaling more than \$17 million to customers and contractors.

- **Nicor Gas - Portfolio Administration (2017 - Present).** Resource Innovations administers the following programs: Home Energy Savings (Retrofits and Home Energy Assessments; Air Sealing and Insulation (SF and MF; Income Eligible Energy-Saving Kits; Affordable Housing New Construction; Multi-family Energy Savings; Public Housing Authority Energy Savings; Central Plant Optimization Program (CPOP); Multifamily Custom and Prescriptive; and the Energy Efficiency Offering. We are responsible for all client management activities, including reporting, data management, program design input, client relationship management, and subcontractor management. We also manage local trade partners, community action agencies (CAAs), and community-based organizations (CBOs) who identify projects and complete measure installations. To date, we have helped Nicor Gas income-eligible customers save more than 3 million therms and provided approximately 3,500 single family and 11,100 multi-family households with substantial home upgrades. We have also extended Nicor Gas' reach throughout their entire service territory to serve historically underserved customer segments and geographies.
- **Commonwealth Edison Portfolio (2008 - Present).** We helped ComEd expand a single RCx program from a pilot program with four projects into a robust, award-winning portfolio that completes 250 RCx programs each year. ComEd has expanded our role to administer or support an array of programs in a diverse service territory that includes Chicago, suburban communities, and rural areas. We administer the following programs for ComEd: Small Business (2011-Present); Retro-Commissioning (2008-Present); Home Energy Savings (2022-Present); Community Action Agency Income Qualified Program (2018-2021, at which point the program expanded into Home Energy Savings); Standard Offering (2022-Present); and Single Family and Multifamily Whole Home Electrification (2022-Present) We have also provided additional services such as an online marketplace, strategic energy management, and evaluation services among others. Combined energy savings goals for the ComEd C&I programs we currently run are 431,096 GWhs with a total incentive budget of \$122,431,264 for 2023.

We also have experience working on programs in each of the listed categories and have included examples for each below. These examples are not exhaustive as we oversee many programs.

1. The point of contact/liaison for:

a. Public Utility Commissions and Staff

California Public Utilities Commission - California Market Transformation Administrator (2022 - Present). Resource Innovations and partnering firms are developing and delivering a high-value portfolio customized to the unique California landscape based on our experience in the Northwest, the Midwest, and internationally. In our role as administrator, we are leading the set-up and management of a stand-alone non-profit. Resource Innovations will continue to consult and support MT development for this non-profit. Our aim is to incorporate long-term energy savings and non-energy benefits such as California's objectives linked to greenhouse gas (GHG) reductions, equity, and environmental justice goals. Resource Innovations' founder and CEO Lauren Casentini designed MT intervention strategies and indicators across Pacific Gas and Electric's portfolio.

Texas Stakeholder Engagement. In Texas, we are active with multiple local industry groups, including the American Society of Heating, Refrigerating, and Air Conditioning Engineers (ASHRAE), the Association of Energy Service Professionals (AESP), Texas Energy Managers Association (TEMA), Hotel & Lodging Association of Greater Houston, Houston Building Owners and Managers Association (BOMA), and Association of Energy Engineers (AEE). We have engaged stakeholders in Texas to ensure that our solutions are collaborative and effective. We are active participants with the Public Utility Commission of Texas' Energy Efficiency Implementation Project where twice annually, we convene with all Texas utilities to discuss statewide energy efficiency topics.

b. State or Federal Agencies

Resource Innovations serves numerous state agencies, including:

- **Colorado.** For the Colorado Energy Office Cannabis Resource Optimization Program, we provide audits, energy assessments, marketing and outreach, resource benchmarking, project funding assistance, and implementation support.
- **Indiana.** Resource Innovations is finalizing a contract with the State of Indiana to support the design and implementation of their statewide IRA-funded program. We expect to be under contract by the time the Louisiana Statewide Energy Efficiency Program RFP is released.
- **Ohio.** Resource Innovations is finalizing a contract with the State of Ohio to oversee the design and implementation of their statewide IRA-funded program. We expect to be under contract by the time the Louisiana Statewide Energy Efficiency Program RFP is released.
- **Oregon.** We support the Energy Trust of Oregon's Order Site, Small Business (as a subcontractor), and Allied Technical Assistance Contractor programs.
- **Massachusetts.** We implemented and administer the Mass Save Rebate Processing program, which requires coordination between electric and gas utilities across Massachusetts to implement a single application portal and processing experience for a full range of residential products. This

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six-utility effort expanded to a three-state, 12-utility effort, led by the Massachusetts utilities and administered by Resource Innovations.

- **Wisconsin.** Resource Innovations' e-commerce team developed and maintains Focus on Energy's residential marketplace, offering discounted smart thermostats, advanced power strips, lighting, and water-saving devices to Wisconsin customers.

c. Energy Efficiency Contractors or Evaluators

Duke Energy - Residential HVAC (SmartSaver) Program Evaluation (2016 - Present). Since 2016, Resource Innovations has performed independent evaluations of Duke Energy's energy efficiency program portfolio, including the residential HVAC program that offers existing and new construction residential customers incentives for improving energy efficiency through the installation of HVAC units, smart thermostats, heat pump water heating, variable speed pool pumps, duct sealing, and attic insulation. We conduct impact and process evaluations for Duke's North and South Carolina, Indiana, Ohio, and Kentucky service territories. Duke Energy selected our team based on the strong client relationship we developed through prior evaluation cycles and our demonstrated ability to deliver high-quality assessments that meet or exceed client expectations.

FEECA Utilities Technical Potential Studies (2022 - Present). Resource Innovations was retained by Florida Power & Light to complete technical potential studies of DSM measures and renewable energy systems on behalf of six utilities. The scope of the studies includes energy efficiency, demand response, and distributed energy resources opportunities across the residential, commercial, and industrial sectors, including interaction between these categories of DSM to account for overlapping impacts. In addition to the technical potential analysis, we are assessing the economic and achievable opportunities for a subset of the six utilities. The results of this study will be used as the basis of the utilities' DSM goal-setting process for 2025-2034 in the 2024 Florida Goals Proceeding.

d. Public Utilities

JEA - Fleet Electrification Program (2023 - Present). Resource Innovations launched an innovative EV Fleet Electrification Program to assist fleet customers with the transition from conventional internal combustion engine vehicles (ICE) to EVs. This turnkey program has a service offering for all JEA C&I customers with fleet vehicles, regardless of fleet size or type. The program helps customers develop of a comprehensive Fleet Conversion Plan (FCP) and supports customers as they implement fleet electrification projects. For program eligibility, customer facilities must have a non-residential JEA electric service. This program is intended for JEA's commercial electric customers currently operating fleets of ICE vehicles primarily within JEA's service territory (Jacksonville, Florida, and the surrounding communities). By leveraging the experience and resources of both Resource Innovations and JEA, customers receive a range of benefits including a total cost of ownership (TCO) tool hosted on the JEA website, access to the Fleet EV Expert team to help customers utilize the tool and program, connection to an implementation contractor, and help with planning their conversion. A range of services such as fleet assessments, assistance with EV procurement and charging infrastructure, as well as financial incentives, are readily available.

Burbank Water and Power, Burbank, California - COVID-19 Residential Assistance Program Support Services 2020 - 2021). In October 2020, Burbank Water and Power selected Resource Innovations to help their residential customers who were unemployed due to COVID-19 meet their bill obligations or deferred, past due bill payments. BWP designed the program to provide these customers with a bridge to help customers meet their electricity bill payments until they became eligible for federal, state, or other BWP assistance programs due to prolonged unemployment. Through the program, we created an online application portal that customers used to apply to participate. As part of the campaign, our representatives provided customers with information about program benefits; explained eligibility requirements about program participation requirements and required documentation needed to participate; gathered customer information about their current employment situation and ability to pay; and guided the customer through the online customer application portal. We successfully processed more than 4,250 applications for BWP leading to the enrollment of 3,100 customers into the program and more than \$730,000 in relief.

e. End-Use Customers

Multifamily New Construction Building Audits, Energy Modeling, and Certification Support (2019 - Present). Resource Innovations contracts with Utah building developers seeking tax credits or lower interest rates through federal and state housing credit programs if their low-income residential buildings meet energy-efficiency eligibility requirements which includes ENERGY STAR® Multifamily New Construction (MFNC) program certification. Independent of our new construction residential project work with Utah utilities, this direct-to-customer service began with Salt Lake City-area building developers requesting our support in obtaining incentives to build more energy-efficient developments for low-income families. The ENERGY STAR MFNC program is administered by the U.S. Environmental Protection Agency (EPA), which uses multifamily review organizations (MRO) to oversee the program. The MFNC program is available for all residential new construction, except single-family detached homes and two-family dwellings. There are three paths to earning MFNC project certification. Builders/developers may choose from the following paths:

- **Energy Rating Index (ERI):** Use an approved modeling software to determine unit-by-unit energy usage compared to an ERI target and follow a prescriptive package of energy efficient measures developed by EPA in common spaces; or
- **ASHRAE:** Use an approved energy modeling software to determine the building's energy usage compared to ASHRAE code requirements; or
- **Prescriptive:** Use a prescriptive package of energy efficient measures developed by the EPA.

To achieve MFNC program certification, Resource Innovations has worked closely with building developers in design review and consulting, monitoring and testing throughout the construction process, final testing and documentation, and working with MROs to obtain certification and submit projects. To date, Resource Innovations has completed an MFNC certification for a five-story affordable housing apartment community with 140 micro and one-bedroom units. Resource

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Innovations is currently working with Salt Lake City-area developers for two other affordable-housing communities to achieve MFNC certification.

f. Working Groups

San Diego Gas & Electric (SDG&E) - DER Forecasting to Support Electric Distribution Resource Planning (2017- Present). Resource Innovations staff forecast the economics, load impacts, and adoption of DERs for SDG&E. Technologies analyzed include rooftop solar photovoltaics, behind-the-meter battery storage, and electric vehicles. Analysis and forecasting support SDG&E's distribution planning efforts through spatial forecasting of DER adoption and peak demand impacts. Forecasts are calibrated to historical adoption data at the ZIP code level of granularity, which is ultimately allocated to feeder level impacts. As part of this project, Resource Innovations staff participate in California's Distribution Forecasting Working group - a consortium of IOUs, the California Public Utility Commission, ratepayer advocates, technology advocates, environmental advocates, and industry experts.

Duke Energy Carolinas, LLC and Duke Energy Progress, LLC Carolinas Collaborative Advisory Group. Resource Innovations has been studying the energy efficiency market potential for the Duke Energy service territories in North and South Carolina. In addition to conducting the analysis of technical, economic, and achievable energy savings potential for standard and emerging measures, Resource Innovations represented Duke Energy before the Carolinas Collaborative Advisory Group ("Collaborative"), a working group comprised of 52 individuals representing 35 different organizations from across the Carolinas and the Southeast including regulators, state agencies and energy offices, the Southern Alliance for Clean Energy, the Sierra Club, the National Resource Defense Fund, and other low-income and environmental advocacy groups.

In our **MT work for CPUC** described on page 6, we have formed and operate the Market Transformation Advisory Board (MTAB) to advise our team on the design, development, and deployment of market transformation initiatives (MTIs) and ensure transparency.

Resource Innovations has engaged similar working groups for Georgia Power, Duke Energy Indiana, Santee Cooper, and JEA.

2. Organizational, financial, and data tracking abilities for both individual projects and overall programs

Our program software system is a centralized data repository and modern control center for program information that ensures transparency and accountability. Using the system, LPSC can securely collect, store, track, and report on consumer, funding, measure, project, program, and portfolio data. Our system provides end-to-end program management and administration that gives administrators the ability to securely track and manage program and consumer project data across multiple program types, including residential, small business, new construction, multifamily, C&I, midstream, and agricultural that span a breadth of projects. With our software, program budgets

and project financial data are accessible and securely shared and matched with back-office systems. Authorized staff have access to program data to monitor portfolio, program, and project details.

LPSC and your stakeholders can instantly view program-specific performance in a dashboard view for budgets, as well as actual and projected savings. They can dive into specific data to analyze a variety of project details. Stakeholders can configure ad hoc and standard reports to meet internal and program-specific reporting needs and regulatory requirements. The software's regulatory and program reporting capabilities create reports on forecasting, achieved savings, administrative costs, incentives paid to date, incentives remaining, cost-effectiveness data and formulas, implementation contractor performance, measure details, and consumer information (e.g., geographic or demographic participation information). With our software, stakeholders have increased visibility into the program activity and data and reduced compliance risk with one source of reliable warehousing of consumer, portfolio, and program savings and cost data. The system offers comprehensive and accessible reporting for transparency to interested stakeholders such as the Alliance for Affordable Energy, EM&V contractors, and other regulatory agencies.

3. The use of data to monitor and track successful energy efficiency programs, and the ability to develop analytics from said data to illustrate the success/failure rate

Our software platform's reporting is highly configurable and can provide regular, automated reporting of the following program metrics for the LPSC:

- **Regulatory Reporting.** Our software platform can export data for stakeholder and regulatory reports. The system can create report templates that mirror report formats for a seamless reporting delivery mechanism to regulatory agencies. We can use ad-hoc and scheduled reporting and dashboards for your program managers, EM&V contractors, and other stakeholders to view portfolio and program performance quickly.
- **Program Manager Reporting.** LPSC program managers gain visibility into projects and can establish priority levels and project status checks, including ad hoc and scheduled standard reporting capabilities. Out of the box, our software incorporates analytics dashboards (based on Tableau) and reporting (based on JasperSoft) to produce tailored reports and ad hoc queries. The analytics engine leverages a data dictionary and our software's reporting tools to report on required data points and metrics.
- **Operations Report.** LPSC can compare the system's data with financial databases. Data includes project participation, estimate energy savings, emissions, incentive amounts, measure costs, administrative costs, direct install costs, project completion dates, and expenditures committed but not paid.
- **Annual Report.** LPSC can develop complex reports with multiple tabs and formulas to produce a polished regulatory compliance report. This report might calculate the cost-effectiveness of a program or measure(s), or other key parameters and variables referenced by the cost-effectiveness tests.

LPSC can schedule reports for secure delivery and have them automatically sent to applicable LPSC staff and EM&V contractors. We can configure reports and dashboards in our software platform and provide secure access to LPSC and EM&V contractors based on specific user permissions. LPSC can use this functionality to export any data from the software to build a custom data warehouse, if necessary. Our software includes several options to query and report on projects, programs, and other data. The software user interface allows the user to browse projects, measures, and participation across all programs. Users can sort and filter by relevant criteria and search by configured fields within the programs to obtain the desired reporting results. The user can expand projects to view additional details, including project notes, form-level data, workflow steps completed, cost and savings allocations, and customer and payment information. Using this functionality, LPSC can develop reports that support state requirements, quality assurance activities, lead analysis, evaluation, and invoicing.

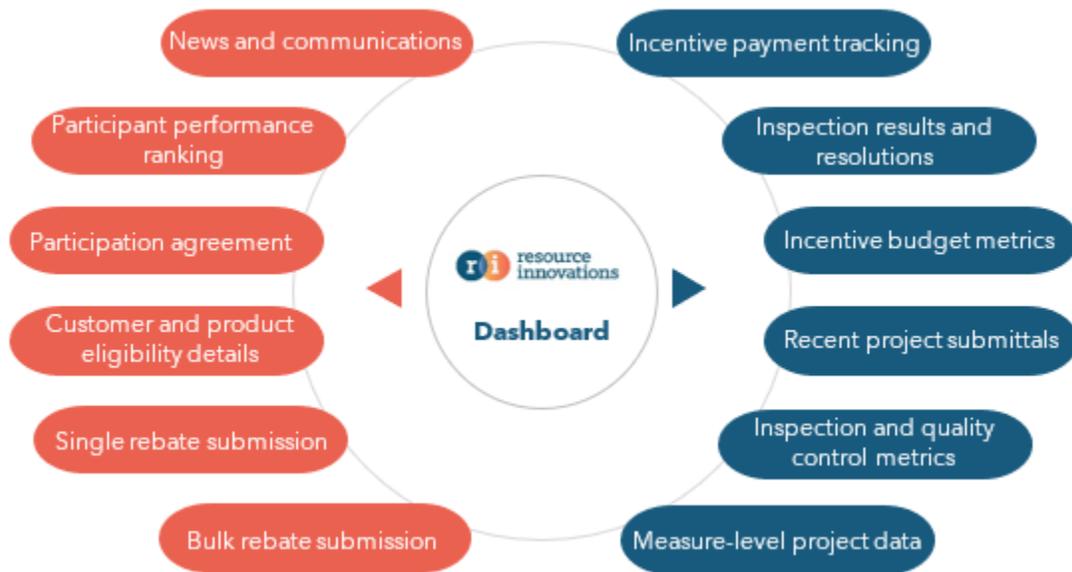
Reporting Dashboard

The software platform includes analytics dashboards and reporting to produce tailored reports and insightful visualizations. Our reporting makes it easy for LPSC to compile project data in an organized way, and to configure reporting to fulfill compliance requirements (e.g., regulatory reporting) or provide insight into your portfolio. The software analytics provides interactive dashboards with facts and dimensions that you can sort by program, portfolio, implementation contractor, leads, customer, time (e.g., year, quarter, month), and defined goals. Our platform's role-based security extends to reporting and analytics to ensure that sensitive data remains protected.

Dashboard views summarize performance metrics pertinent to each user's needs. These include:

- Project-focused users search for and select serial numbers, installation addresses, or customer IDs from the dashboards to quickly add project data. Dashboards limit access to customer data, product eligibility, project submittal data, participation, performance metrics, and inspection results to what is relevant to users' roles. Users can access inspection dashboards that include inspection results searchable by customer ID, name, address, and project size. Results are available in views that show the inspection status, outcomes, and details. Results can be sorted by dollar value or unit quantity. This interactive view allows users to track projects they plan to correct and make notes on their intended methods of resolution.
- Program administrators leverage dashboards to monitor program performance (shown in Figure 1) and review new project data in a measure journey view that shows measures by serial number and influence at each touchpoint.

Figure 1: Dashboard Metrics to Monitor Program Performance



Examples of reports are provided in Appendix C.

4. Development of a standard operating procedure to support managing an organizational structure with clearly defined roles and responsibilities, within various areas, including how those coordinate and work towards the same goals

Resource Innovations has a strong record of successfully managing projects for utilities across North America. We will apply our best practices to provide LPSC with effective, efficient, and transparent project management that supports timely program launch and delivery. It is critically important to ensure that each project is appropriately resourced to be successful. For Resource Innovations, project resourcing begins at the proposal stage by building a budget and project plan that ensures a healthy program from the outset. We also develop a resource plan so that upon contract award we can seamlessly transition assigned team members to the program. Our program team will integrate the following project management best practices and a partner-focused approach to delivery:

- We define a clear project plan that includes project schedules, responsibilities, and milestones. The project plans and schedules guide the functional teams in effective planning toward deliverables.
- We use our software to track projects, measures, savings, and payments. We configure our software to meet the needs of numerous energy efficiency programs and can easily expand the platform to address LPSC's specific needs. As our Program Manager, Tara Dennis will update the tools at least weekly to plan and allocate resources to tasks. We will review, report, and process updates with LPSC at least weekly.

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- We will hold weekly internal meetings with the program team to stay informed about resource allocation, proactively identify potential program management issues, and develop and implement mitigation strategies.
- Tara will update our standardized program action item tracker weekly, which includes a summary of all action items, responsibilities and due dates, and key decisions. Tara will develop a monthly status report outlining tasks completed in the last period, upcoming tasks, identification of any risks/challenges, and mitigation measures to address them.
- We will hold recurring project meetings to inform LPSC about resource allocation, proactively identify potential project management issues, and develop and implement risk mitigation strategies. We will schedule and host recurring project meetings with implementation contractors to track their progress, help them address barriers and issues, and provide support.

In collaboration with LPSC, we will develop a Program Manual. The manual will consist of three sections: Participant, Trade Ally, and Internal Operations.

- The participant manual will outline the guidelines and procedures that govern program administration and customer participation, including Resource Innovations and LPSC roles and responsibilities.
- The trade ally manual will discuss program procedures and processes and quality assurance and control, including checklists, invoicing, reporting, safety requirements, dispute resolution, and marketing guidelines to support customer outreach methods.
- The internal operations manual will serve as Resource Innovations' operational manual for implementing your Statewide Energy Efficiency Program. This manual provides specific information about each program's design, rules, policies, and procedures that determine program administration and customer participation.

We take client satisfaction, goals, and delivery of contractual requirements seriously. We use continuous program monitoring and optimization activities to ensure we will start-up, launch, and implement your Statewide Energy Efficiency Programs on time and in a way that meets LPSC's program goals. Our progress toward achieving LPSC's program goals and KPIs are reviewed and evaluated at all levels. If program results or KPIs are off target, then the program team, working with our executive team, develops corrective action plans for review and approval by LPSC. We will monitor and adjust the corrective action plans as necessary to meet LPSC's expectations.

5. Energy efficiency program design based upon set savings goals and/or budget parameters

Our approach to LPSC's portfolio design will leverage the most cost-effective solutions and measure offerings to establish a foundation while other solutions and measures develop into more cost-effective approaches. Our team is the leader in solution design. Our approach for the Louisiana Statewide Energy Efficiency Program will build on our experience in this market to meet customer needs while maintaining regulatory integrity and building better relationships between LPSC and your customers.

We will work with the LPSC to establish solution design goals to:



To meet these goals, we will leverage some of the same solution design components that have provided success in our other programs including Salt River Project, Dominion Energy Virginia, CenterPoint Texas, and Nicor Gas.

6. Confidentiality rules/restrictions, including the ability to protect customer specific information and data, and has abided by such in the past

Resource Innovations maintains stringent data privacy and information security practices to protect all data and information. Our data security policies and protocols align with industry best practices to securely handle and store client and customer-specific data. In addition to our internal policies and established controls, we work with our clients to securely handle and store their information in accordance with the applicable contract requirements. Our software is a cloud-based Software as a Service (SaaS) solution that uses industry standard authentication and authorization mechanisms. The system's security framework provides granular authentication and authorization, including access levels to the screens, data, and actions that a user can perform. All users access the system using common web browsers (e.g., Chrome, Firefox, iE11 and Edge) with no additional hardware needed. All users must have a valid user ID and password with associated roles and entitlements that determine level of access. We secure all sensitive data in transit and at rest, securing all inbound and outbound communication through the Hypertext Transfer Protocol Secure/Secure Sockets Layer (HTTP/SSL) using TLS 1.2- and 256-bit encryption. Our platform is a SOC II compliant platform. We use the AWS public cloud infrastructure for hosting. AWS is a SOC II compliant subservice organization that provides 24/7 coverage to the hosting environment. Resource Innovations uses AWS data centers and availability zones within the United States.

7. The ability to hire/vet implementation contractors to ensure the highest quality of vendors are being utilized

We recruit and engage local implementation contractors (or trade allies) to sell energy efficiency offerings to customers and enroll customers in programs through the outreach they conduct for their own businesses. We will recruit implementation contractors and approved contractors through a competitive bidding process and will train them thoroughly. Some of our core recruitment strategies include:

Begin with Top Producers. Upon contract award, we will prioritize connecting with the programs' historic top producers to ensure they remain engaged and supported through the transition and launch process. They will serve as important program advocates and need to know what resources we have available to them and how we are going to collectively help their businesses succeed.

Expand Engagement. After we have established relationships, we will expand engagement across all registered trade allies seeking to increase program participation from other trade allies by identifying barriers.

Target DBEs and SBEs. With equity as a core pillar of our business, we are passionate about bringing diverse groups to the table to ensure program funding reaches all populations - which includes reaching out to the local contractors serving customers across Louisiana's service territory. We will use geo-targeting to identify geographic gaps in trade ally networks, then focus recruitment efforts in those areas, which are typically rural and underserved.

In our experience, training implementation contractors encourages them to participate in energy efficiency programs and allows them to grow and expand their businesses. After completing the required program training under the mentorship of Resource Innovations staff, approved trade allies can participate in the Louisiana Statewide Energy Efficiency Program. Our staff will continue to mentor implementation contractors and perform quality control checks to ensure customer satisfaction with program ally projects. We will verify each trade ally's qualifications and maintain those records. We check that each program ally is licensed to work in LPSC's service territory. As training sessions with the implementation contractors commence, we will record who has been trained and in what capacity. We will ensure an adequate number of participating trade allies are available and target partnerships that have the greatest impact. We seek and develop relationships with highly qualified, customer service-oriented trade allies and engage them through compelling and informed outreach and training. We will collaborate with LPSC to ensure we make course corrections to meet customer expectations and trade ally goals.

We teach trade allies how to leverage programs to boost sales of qualifying technologies, increase profit margins, and improve customer satisfaction. In turn, we create local jobs, sustain market momentum, and help grow their businesses. We provide trade allies with the tools and support they need to effectively market programs, become well-versed program experts, provide high-quality consulting and installation services, and deliver superior customer service. Resource Innovations will

incorporate best practices in trade ally management (Figure 2) to ensure they are able to provide an excellent customer experience.

Figure 2. Best Practices in Trade Ally Management

Robust Network Management

- Quality checks via on-site inspections and customer surveys
- Regular performance evaluations

Comprehensive Training

- Regular educational and training sessions
- Mentoring and coaching via field visits, meetings, and ride-alongs



Cost-Effective Engagement

- Client's current network
- Existing trade ally relationships

Stringent Qualification Process

- Industry-standard process
- Requirements reflect client's needs and goals
- Validation of expertise, experience, coverage, and references

8. Familiarity with financial systems for energy efficiency programs in order to coordinate payments between utilities and implementing contractors or utilities and incentive payments to end-use customers, including the review of invoices and program contracts to ensure the work is performed satisfactorily

We have more than 24 years of experience providing application processing, rebate and payment fulfillment, and customer support services for clients across the U.S., including comparable high-volume programs for Dominion Energy in Utah, Virginia, and North Carolina; ComEd for small business, RCx, and other programs; Rocky Mountain Power in Utah, Wyoming, and Idaho; and Pacific Power in California and Washington. Among the services we offer are the following:

Industry-Leading Application and Rebate Processing. Our team processes rebate applications for a variety of utility programs, including electric, natural gas, water efficiency, renewable energy, EV, and DR. We can efficiently coordinate payments between utilities, and to trade allies and end-use customers. Our expertise allows us to provide a seamless experience for downstream, upstream, and instant rebate customers. Our team conducts multiple validation checks on all documentation before they can move to the next step in the process.

Prompt Invoicing and Payments. Resource Innovations can quickly fulfill customer rebates via a check sent directly to the customer via the United States Postal Service or alternative forms of fulfillment. Once we receive approval for a batch of payments, we create checks. In addition to paper checks, we provide ACH payments (also known as direct deposits), mobile-enabled, and electronic checks as options for delivering rebates to customers securely, efficiently, and

conveniently. We fully support efforts to ensure check payout and prevent escheatment. We will follow up on all unredeemed checks or other unredeemed payments on a regular basis, and we promptly and securely reissue checks through our follow-up with the customer or upon request.

Configurable Software and Infrastructure. Our experience providing rebate fulfillment and customer support services allows us to easily adapt our existing infrastructure and proprietary software platform to align with business rules based on client, state, portfolio, and program requirements and needs. Our software simplifies complex workflows, enabling our team to deploy program changes with ease and providing LPSC with expanded visibility at the measure, project, program, and portfolio levels via role-based access. Our team is well positioned to drive down and maintain low application residency, delivering rebates quickly and accurately for LPSC's customers. This creates a positive customer experience, greater visibility, and data management for LPSC.

9. Experience in branding and messaging of energy efficiency programs for adequate penetration in the various markets, including but not limited to low-income/energy burden households and renters, as well as consistent marketing statewide

Resource Innovations delivers efficient and cohesive messaging, marketing, and outreach to support dozens of energy efficiency programs. We leverage this experience and the expertise of our marketing team to deliver consistent messaging, event coordination, and targeted outreach campaigns that drive demand, exceed program goals, and increase trust and engagement with customers. We leverage our professional marketing and subject matter expertise to provide high-quality, creative, and engaging content that presents a strong business case for energy efficiency and compels participants to overcome perceived barriers.

Resource Innovations has managed successful marketing campaigns that have expanded program reach. One campaign brought in 1,000 projects and 34 GWh of savings in just seven weeks for ComEd's Small Business Program.

It is important for customers to recognize these programs are being delivered on behalf of the LPSC. We are skilled at partnering with clients as an extension of their marketing staff and adhering all materials to LPSC brand guidelines and ensuring ADA compliance for all digital marketing efforts. We provide marketing services for C&I, small business, custom and prescriptive, transportation electrification, residential, agricultural, and other program types. We are experienced in providing marketing services for low-income households – single and multi-family – to homeowners and renters. For example, Resource Innovations implements Ameren Missouri's Single Family Income Eligible and Multifamily Income Eligible and Market Rate programs to residential low-income customers in Ameren Missouri's service territory. Our focused engagement strategies include partnerships with community-based organizations and purveyors of affordable housing to recruit eligible customers and properties. The objective is to promote the program offerings through local organizations that are already providing services to the target market. Through these trusted channels, the program can build credibility and reduce the barriers to participation. We confirm that

all customers in our target communities are pre-qualified by using Ameren Missouri's data analytics to identify the highest need communities. Marketing examples are provided as Appendix D.

10. Experience in drafting, or assisting in the drafting, of a Technical Reference manual, or similar document

Resource Innovations helped Platte River Power Authority (PRPA) update all their residential efficiency measure savings by developing a Technical Reference Manual (TRM) for their Efficiency Works Homes program. PRPA selected Resource Innovations for this project due to our experienced measure research, measure design, TRM development team, and experience with the Efficiency Works Business program. The scope of work involved reviewing about 40 existing and new measures to determine whether they could be incorporated in the 2022 Efficiency Works Homes Program. We classified the measures as deemed or stipulated to establish an accurate representation of energy savings calculations balancing accuracy with ease of customer participation. We conducted nationwide research on existing TRMs for similar measures with an emphasis on resources in the region or in similar climate zones and used sources such as the Department of Energy to obtain measure parameters such as load shapes. To fine-tune the measures, we analyzed historical Efficiency Works Homes program data, performed benchmarking to compare incentive levels offered by other utilities, and summarized specific criteria such as net-to-gross (NTG) and incremental costs. Our final deliverable was a TRM defining specific details for each measure such as efficiency requirements, energy savings, summer and winter peak demand reduction, gas savings, measure life, and supporting equations and calculations through various heating and cooling scenarios. We have also developed TRMs for SRP and Georgia Power.

11. Experience in producing Program Plans and Annual Reports

We are experienced in producing Program Plans and Annual Reports and begin this process during the launch period. We view the launch period as an important time to strengthen our relationship with LPSC and set up the Statewide Energy Efficiency Program for success. We will begin developing most deliverables upon contract award and develop them concurrently, which will enable us to make effective progress on launch milestones. The following is a high-level summary of our launch plan and timeline:

- **Upon contract award**, we will finalize our detailed launch plan and provide a granular breakdown of tasks, durations, and interdependencies of the launch work.
- **During the first two weeks**, we will finalize major design decisions that have cascading impacts across all deliverables.
- **Within the first month**, we will complete the Program Plan and Implementation Plan, with near finalization of the Marketing Plan and Procedure Plan.
- **We will develop** most client-branded deliverables in parallel for prompt finalization.

We will develop the documents, practices, and procedures associated with the Statewide Energy Efficiency Program, including an annual report to LPSC and stakeholders to include impacts and

lessons learned from the year. Our team has experience with similar large-scale programs such as the ComEd Standard and Small Business, Dominion Energy Virginia Income and Age Qualifying and EnergyShare Weatherization, and Santee Cooper EVolve Grant programs that require regular annual strategic program plan deliverables and quarterly or annual reporting. Our team will complete all critical launch tasks to whatever specifications and visibility is needed.

12. Ability to have at least two local offices, including at least one call center, within Louisiana with qualified people who are knowledgeable on energy efficiency and the State of Louisiana

Resource Innovations will open two local offices in Louisiana, including at least one call center, to allow frequent in-person communication with LPSC staff and to ensure complete coverage of the entire territory. We currently have four customer service representatives living and working in Louisiana, which will help provide a seamless experience. We also recently opened a large incentive processing center and call center in Boston, Massachusetts, to serve our Tri-State Rebate Fulfillment Services program with an overall customer call intake average of 1,000 calls per day across three states. From program launch through January 2024, we issued approximately \$120 million in rebates for more than 65,000 projects (\$40 million issued in January 2024 alone). We anticipate issuing \$170 million in rebates this year on just the Tri-State (MassSave) programs where we do the rebate and incentive fulfillment. We will leverage our experience opening at least two facilities in Louisiana to ensure successful outcomes within the State of Louisiana.

13. Experience facilitating smooth transitions of utility-led EE programs to third-party administered ones

Resource Innovations successfully transitions energy efficiency programs and portfolios to generate improved cost-effectiveness and efficiency, higher savings, and greater program penetration to utilities such as Santee Cooper. These transitions can include contract negotiations, establishing performance-based contract management plans, data migrations, and setting up new tools and platforms. We scale and right-size teams to ensure seamless transitions take place for customers and market partners while achieving significant improvements in portfolio and program performance. Our approach includes: 1) preserving what is working well, 2) developing and implementing an effective risk management strategy, 3) identifying areas for improvement, 4) developing solutions to streamline and enhance operations, and 5) aligning portfolio administration and implementation with LPSC's portfolio mission and goals. We will ensure no gaps occur in service, performance, security, or the customer experience. Key transition activities will include cataloging all existing data, documents, processes, customers, and projects; planning for careful data transfer and management; and

Our team's successful 2018 transition into the PG&E ESA Program implementer role in the Bay Area region demonstrated our ability to execute complex onboarding activities and deliver results through sensitive transition periods. Despite some challenges, we served 20,000 homes and met quality goals in our first year.

Program Administrator to Design and Implement a Statewide Energy Efficiency Program in Louisiana

defining staff roles and responsibilities. We will review all existing documents, systems, processes, and staffing plans to recommend improvements for LPSC's review and approval.

Appendix A Conflict of Interest Statement

Conflict of Interest Statement

Trent Brackenridge, Senior Vice President of Program Delivery, was involved in the design and development of the first energy efficiency programs in Louisiana starting in New Orleans and during the first part of the Louisiana Quick Start programs in 2011. His role was Program Manager, and he was with a different company at the time. To the best of our knowledge, we do not have any other potential conflicts of interest.

Appendix B Resumes

Resumes for the following team members are provided after this page:

- Trent Brackenridge, Senior Vice President, Program Delivery
- Tara Dennis, Senior Program Manager



Trent Brackenridge

Senior Vice President, Program Delivery
CEM

Trent is a Senior Vice President for Program Delivery. Trent has 15 years of experience, including his involvement in the design and development of the first energy efficiency programs in Louisiana, starting in New Orleans and then during the first part of the Louisiana Quick Start programs. He has successfully led teams through transformation including start-up, high-growth (10X), and mature phases of business. He has experience leading business units consisting of 250 people serving more than 50 B2C clients in a heavily regulated utility industry. Trent ensured top tier execution of contracts resulting in high levels of client satisfaction, increased share of wallet, and a 95% renewal/rebid rate each year. He drove client and product strategy from planning to implementation phase (CRM) and reduced employee attrition by more than 10% year-over-year from 2017 to 2020.

EXPERIENCE

Senior Vice President, Program Delivery, Resource Innovations (2022 - Present)

Trent is responsible for managing a nationwide team focused on delivering custom-tailored programs and solutions for utilities across North America.

Director of Customer Experience, SunPower (2021 - 2022)

Trent was responsible for managing and scaling a team from 30 to 100 employees focused on customer experience and on-time project delivery for >20,000 residential solar projects in 2022. He developed and implemented organizational, process, and technology improvements to enhance homeowners' experience and improve the NPS for the solar installation process. Trent rolled out new recruiting and interviewing processes to reduce time to hire by two weeks, identified process changes to reduce project cycle times by ~10%, and created and deployed management metrics resulting in a 50% improvement to NPS scores in Q4 2021 and Q1 2022.

Owner, Trent Brackenridge Consulting (2020 - 2021)

Trent was an independent consultant providing analysis and solutions for companies looking to grow or enter the renewables, electric vehicle, or DSM markets. He developed customer acquisition and growth strategies for iChoosr, a group energy purchasing company.

Vice President | Senior Director | Senior Program Manager, CLEAResult (2011 - 2020)

Trent was responsible for implementation of a multi-million-dollar P&L and leadership of a 250-person delivery team spread across 12 Western states. He continually balanced resources between growth-focused initiatives and existing client delivery, and developed growth strategies and new solutions for highly regulated utility clients and their customers. Trent led the successful turnaround of the Northwest/West region by building a highly effective and diverse team of regional directors with strong client management skills that grew market share and contract renewal rates. He implemented solutions to improve rebate and call center resolution rates, drove a gross margin increase of >1% YOY, led successful integration of multiple acquisitions in the West region, achieved 100% contract renewal rate in 2016, 2018 and 2019, and led regional strategy in new markets, EV, grid storage, and carbon reduction.

EDUCATION, CERTIFICATIONS, AND LICENSING

B.S. in Agricultural Economics - University of Missouri

M.B.A. - Baylor University

Certified Energy Manager (CEM)

AREAS OF EXPERTISE

Operations and Performance Metrics • Business Transformation • Strategy • Personnel Development and Management



Tara Dennis

Senior Program Manager

Tara Dennis is a Senior Program Manager in the Resource Innovations Utility Services group. Tara has more than 20 years of program buildout, nonprofit management, contract compliance, government relations, and external affairs experience. She has served in executive operations role where her accomplishments proved pivotal to scale.

EXPERIENCE

Senior Program Manager, Resource Innovations (2022 - Present)

Tara oversees project and program contracts, scopes, budgets, and teams with a focus on continuous improvement. She communicates key objectives, strategies, and priorities to a variety of stakeholders and contributors (program management, software, outreach, data analysis, customer service, and partner teams). Tara creates annual plans and oversees program performance and reporting.

Director of Programs, SERJobs (2020 - 2022)

Tara determined the strategic direction inclusive of operations, workforce management, fund development, budget, contract execution, and compliance. She was responsible for the optimization of departmental efficiencies by strengthening service delivery models and enhancing data reporting processes and analysis. Tara amplified agency impact by augmenting change management strategies and devising SOPs created to meet contractual outcomes; and worked collaboratively with the advancement division to identify, cultivate, and secure agency-wide funding and craft marketing and public relations strategy.

Deputy Chief of Staff/Deputy Operations Director, Mike Bloomberg 2020 - U.S. Presidential Campaign (TX) (2019 - 2020)

Tara served as executive point of contact for all HR/Operations matters, including budget, compliance, recruitment, training, onboarding, logistics, process creation, resource deployment, employee development, metric tracking and reporting, and volunteer pipeline for Texas team (19 offices statewide). She was responsible for strategic resource management and day-to-day support of state leadership and staff (196 staffers statewide), political networks, and vendors.

District Director, U.S. House of Representatives (2018 - 2019)

Tara provided strategic oversight and operations of district offices inclusive of resource and fund development, global constituency relations and partner outreach, data management, compliance reporting, programming, and external affairs. She developed and managed a comprehensive communications and media relations program designed to aggressively raise the district's visibility and served as spokesperson on public relations\crisis management concerns. Tara provided overall management of a district-wide, high-level, volunteer cohort, including recruitment, training, engagement, administration, and retention. She served as a special advisor to sitting U.S. Congressional Member on issues of local, state, and federal advocacy and district-wide legislative affairs - worked with DHS, DOD, DOE, DOL, DOT, HHS, HUD, VA, and USDA. Tara prepared and presented complex statistical and analytical reports.

Senior Manager - Member Engagement and Programs, Greater Houston Partnership (2016 - 2018)

Tara strategically executed a comprehensive overhaul (design, implementation, and stewardship) of a regional volunteer program. Volunteers managed members that represented upwards of 60% of annual revenue. She scaled membership diversification through building of inclusive partnerships and

led the conceptualization and launch of a regionally diverse small business program devised to deliver high-value, low-cost solutions-based coaching and member programming. Tara created a proprietary CRM system to track volunteer and member engagement and interests, conduct data analysis, and generate reports; and developed innovative engagement and retention pathing protocols. She worked with development teams to convert existing volunteers to members and trained staff to work both effectively and cooperatively with volunteers. Tara served in a consultative sales role responsible for the recruitment of a high-growth portfolio of diversified members, covering an 11-county region, and designed, planned, and implemented an aggressive fund development initiative created to exceed organization-wide revenue goals.

Area Vice President, Operation HOPE (2010 - 2016)

Tara provided oversight, vision, fiscal planning, and business development of a four-state market with a 35-member staff - 60% travel. She served in lead executive governance role for multi-state Board of Directors -board administration inclusive of scheduling, logistics, written correspondence, materials preparation, communications, data collection, assessments, term limits tracking, scale, and succession planning. Tara managed diverse, high-level 2,600-member volunteer cohort, including recruitment, training, engagement, administration, retention, and advancement. She provided full-cycle grants management and impact reporting - Federal, State, Local, and Private - awards ranging from \$500 to \$1,000,000. She regionally co-managed a global portfolio of high-profile events and refined assessment methodologies designed for forecasting, metric and milestone tracking, analysis, and strategic alliance reporting.

EDUCATION, CERTIFICATIONS, AND LICENSING

B.S. in Public Health - Texas A&M University

Executive Master of Business Administration (EMBA) with a concentration in Global Marketing - Mercer University

AFFILIATIONS

Hotel & Lodging Association of Greater Houston (H&LAGH) • Association of Energy Engineers (AEE) • Houston Building Owners and Managers Association (Houston BOMA) • Texas Energy Managers Association (TEMA) • American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) • Greater Houston Partnership (GHP)

AREAS OF EXPERTISE

Program Buildout • Government Relations • Stakeholder Engagement • Equity and Inclusion • Diverse Partnerships • Community Engagement

REPRESENTATIVE PROJECTS

CenterPoint Energy (Texas) DM Services - Retro-Commissioning Program (2022 - Present)

Tara serves as the Solutions Delivery Manager (Business) implementing the Retro-Commissioning program for CenterPoint Energy DM Services -Texas. In addition to the day-to-day coordination/management (staff, clients, customers and stakeholders) of active projects, Tara's responsibilities include revenue forecasting and invoicing, outreach, and regional business development efforts. As the face of the program, Tara maintains active industry engagement with seven local trade associations and played a role in assisting the program to post its second largest year recording of 8,181,226 in kWh savings. The program has completed 28 projects since her hiring with another 15+ in various phases in the pipeline to complete in 2024. Alongside her colleagues who successfully implement CenterPoint Energy Indiana programs, she played a role in introducing innovative and more cost-effective offerings to the Texas market. Of notable mention is the fact that she played a lead role in securing the most substantial "get" in the history of the program's existence by inking a deal that brings an entire school district of more than 55 buildings into the program.

Georgia Power Residential Home Energy Improvement EASE and HEIP Programs (2022 - 2023)**Dominion Energy Gas Implementation Services Residential Low-Income Program (2023)**

Tara has also assisted with both the Georgia Power Residential Home Energy Improvement EASE and HEIP programs where her primary role was external invoicing, in addition to the Dominion Energy Gas Implementation Services Residential Low-Income program where she primarily served in a short-term, outreach capacity.

Appendix C Example Reports

Figure C-1: Example of Analytics and Reporting

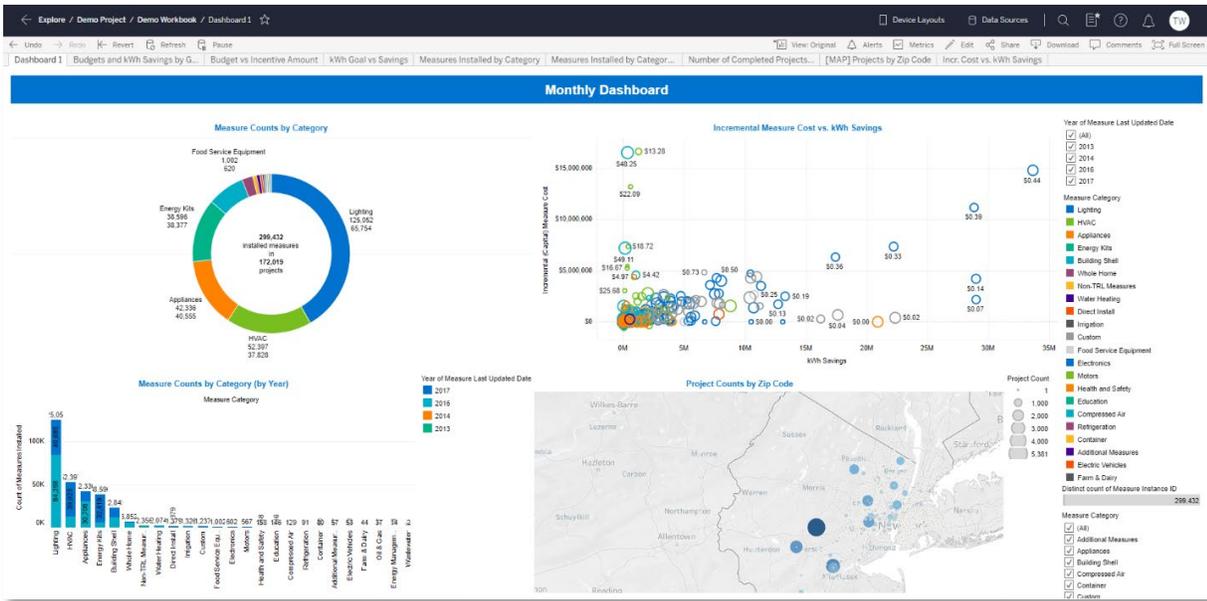


Figure C-2: Leads Dashboard

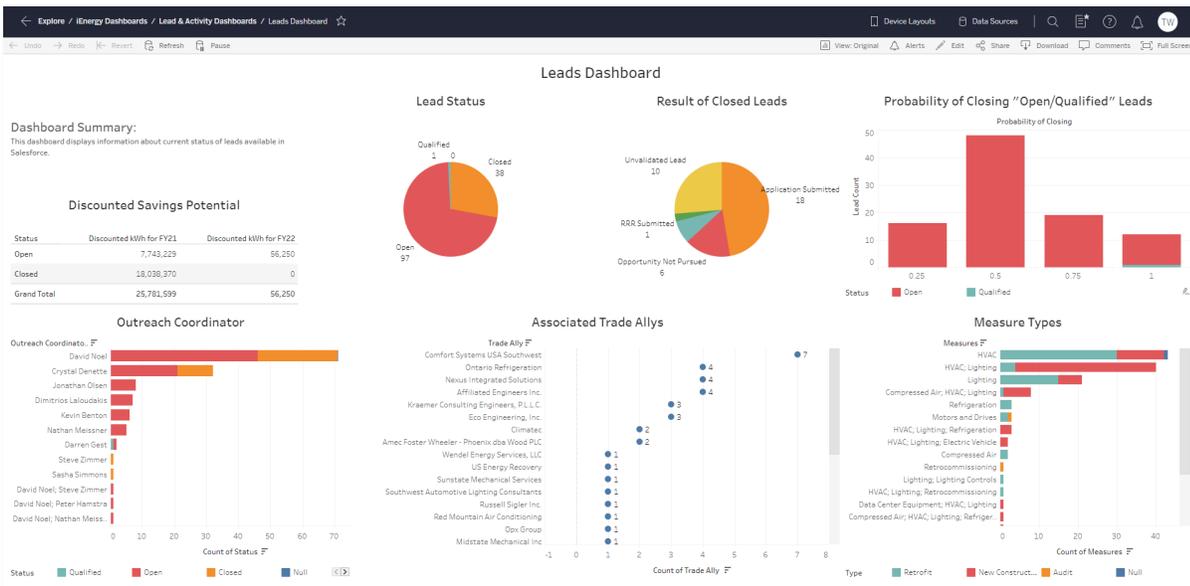


Figure C-3: Program Dashboard

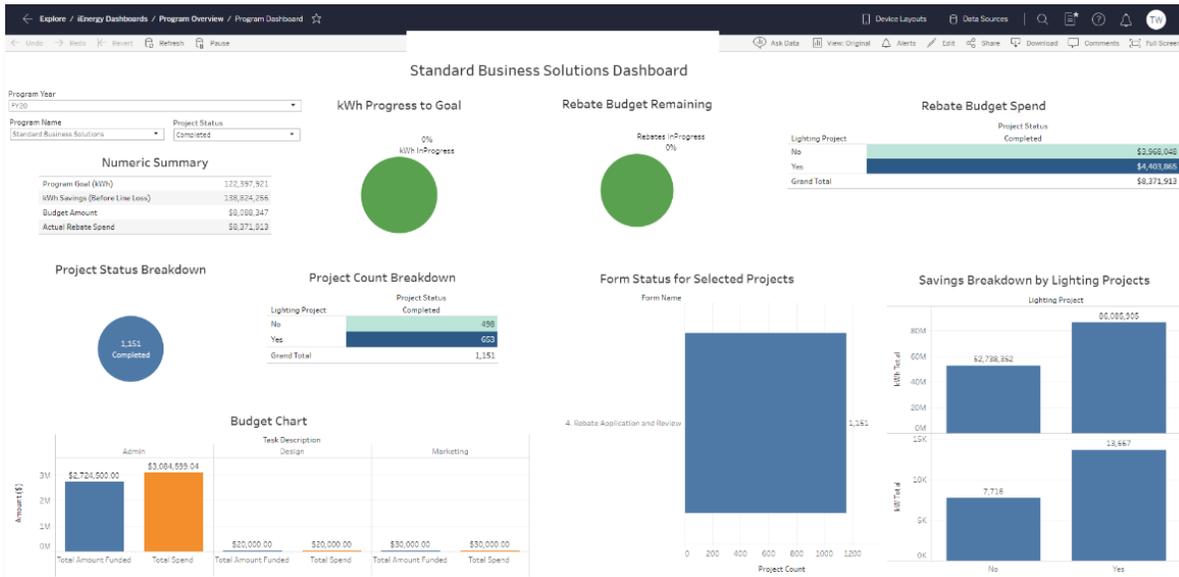


Figure C-4: Distributor Dashboard

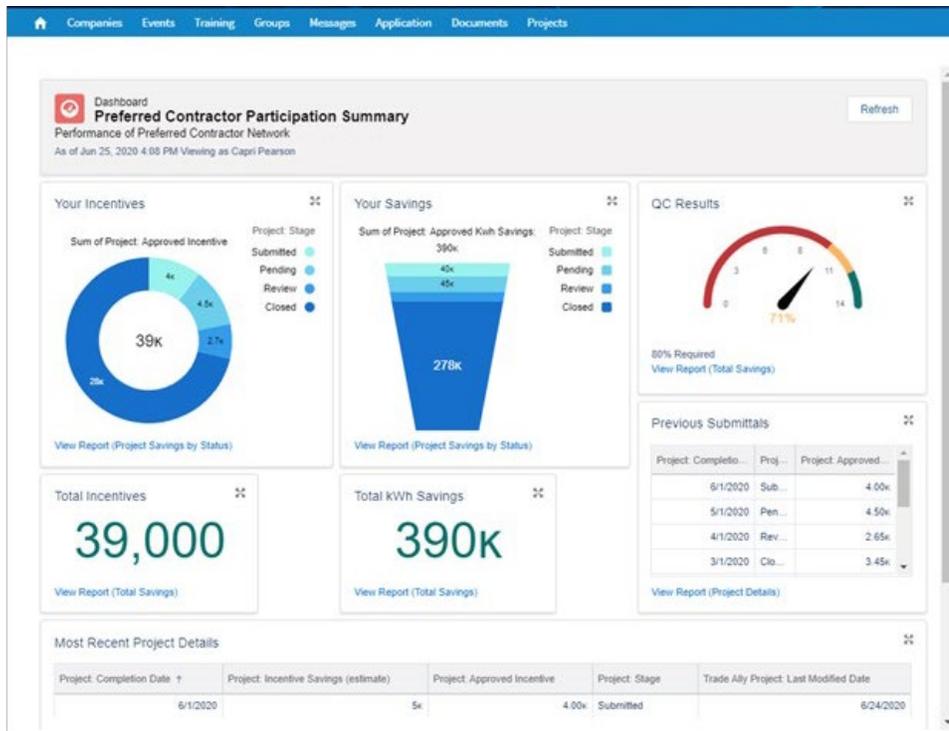


Figure C-5: Inspection Dashboard

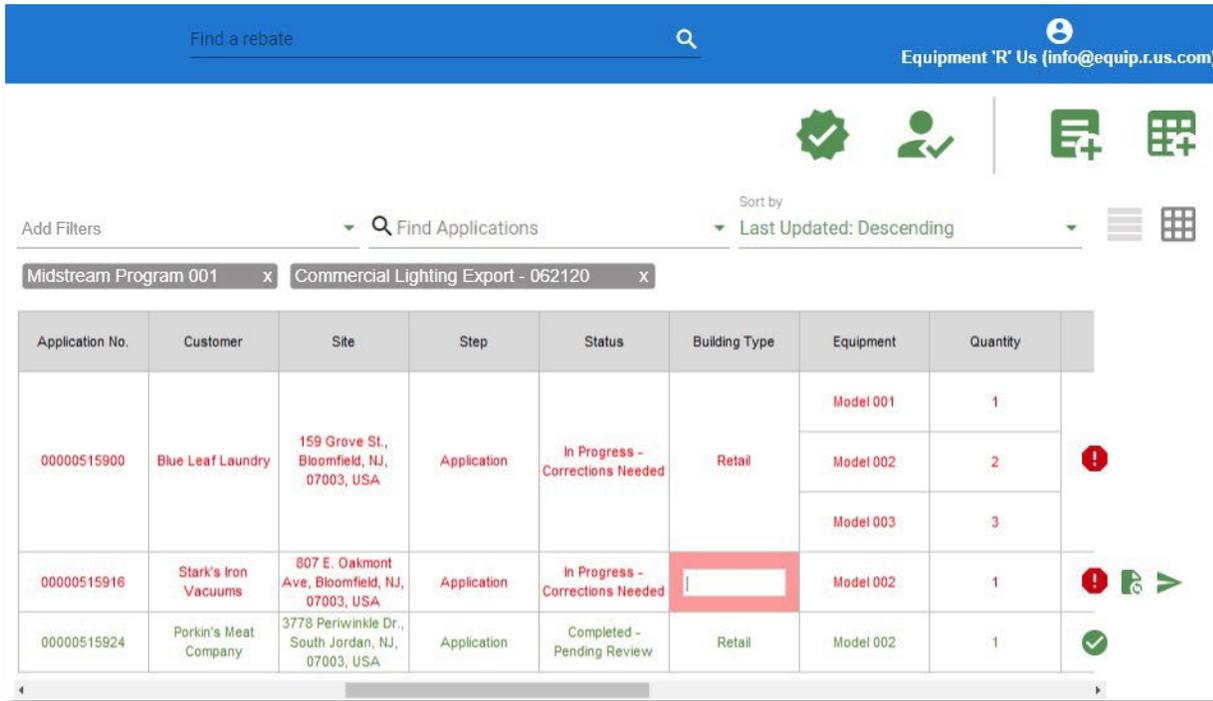


Figure C-6: Program Visualization

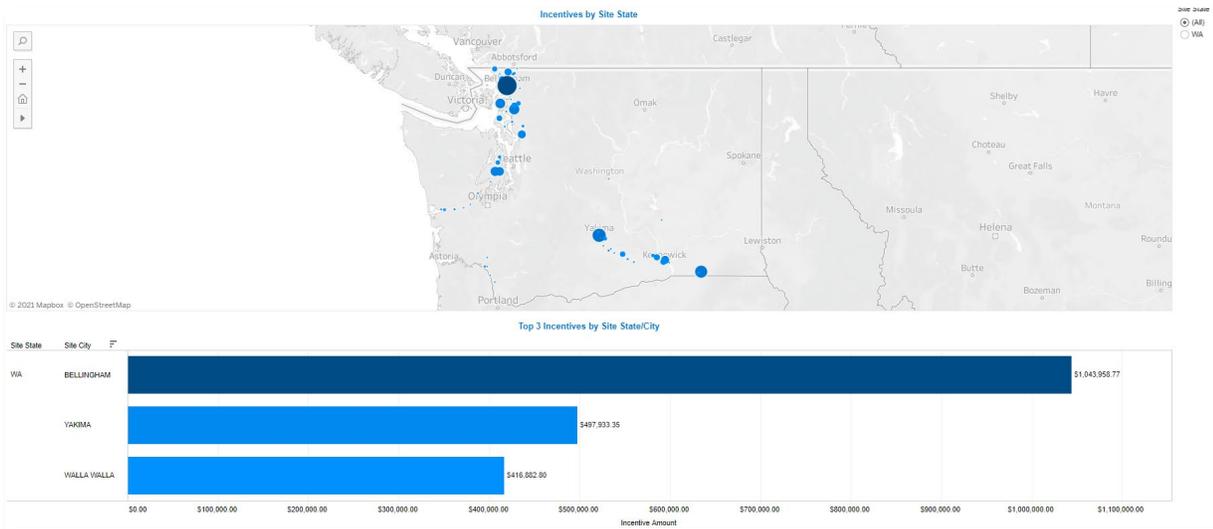


Figure C-7: Incentive Spend and Project Quantity

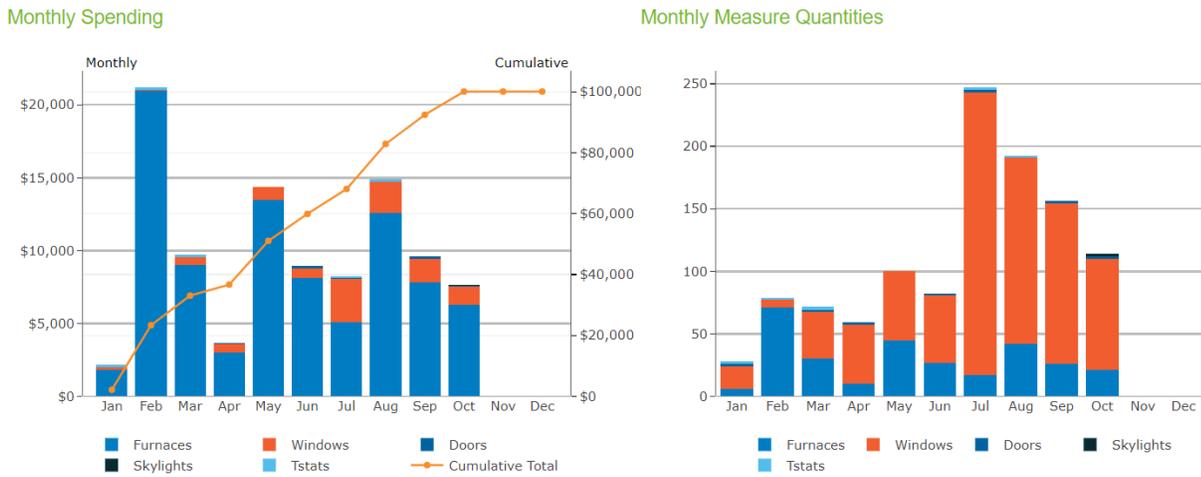
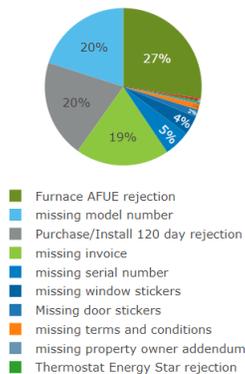


Figure C-8: Program Tracking Targets vs Actuals

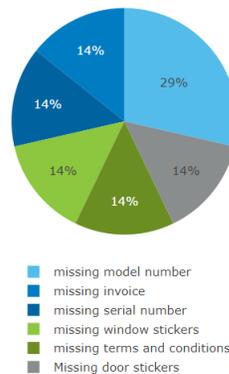


Figure C-9: Rejected and Stalled Projects, Application Submittals

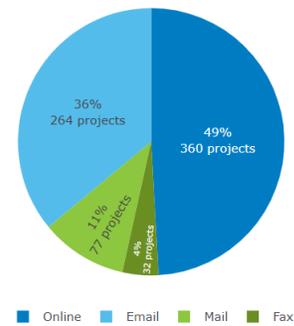
Reasons for Project Rejection



Reasons for Stalled Projects



Application Submittal Methods



Appendix D Example Marketing Materials

Figure D-1: Post-Purchase Mailer

Thank you for your high efficiency equipment purchase!

Your business is saving by making smart energy choices.

BROUGHT TO YOU BY
EVERSOURCE CNG SCG UI
 Part of the AVANGRID Family

PROUD SPONSORS OF
energize CONNECTICUT

Figure D-2: Program Offer Summary Brochure

WATTSMART WASHINGTON
HOME ENERGY SAVINGS

FIND SAVINGS FOR YOUR *home*

START SAVING TODAY

Pacific Power residential customers can apply for WattSmart Home Energy Savings incentives and rebates. Cash back is available for high-efficiency products and services that lower your energy costs and improve the comfort of your home.*

Visit www.pacificpower.com/wattsmart to learn more and find rebates.

Questions? Please email ps@pacificpower.com or call 1-855-855-7231.

Single Family Home Rebates and Incentives

EQUIPMENT	INCENTIVE
Lighting	
Bulbs	Rebate discounts at select retailers
Refrigerators	Rebate discounts at select retailers
Appliances	
Clothes Washer	\$62
Heat Pump Clothes Dryer	\$758
Hybrid Heat Pump Clothes Dryer	\$758
Smart Thermostats	
Smart Thermostat	\$108
Electric Line Voltage Thermostats	
Electric Line Voltage Thermostat	\$58

*Incentives apply. Equipment eligibility and incentives are subject to change. Please check the website for the latest information.

PACIFIC POWER
POWERING YOUR GREATNESS

1-855-855-7231 www.WattSmart.com

WATTSMART WASHINGTON
HOME ENERGY SAVINGS

EQUIPMENT	INCENTIVE
Evaporative Coolers	
Tier 1 Evaporative cooler (2,300-5,499 CFM)	Up to \$62
Tier 2 Evaporative cooler (3,300 CFM or greater)	Up to \$312
Duct Sealing Incentive	
Duct Sealing	\$500
Duct Sealing + Duct Insulation	\$750
Heat Pump Incentives	
Heat Pump Upgrade to 9.5 HSP Heat Pump	\$228
Federal Standard Heat Pump Conversion	\$1,750
Ductless Heat Pump	\$1,400
9.5 HSP Heat Pump Conversion	\$2,750
Insulation Incentives	
Attic Insulation	\$0.46/sq. ft. (\$8.49 or greater)
Floor Insulation	\$0.51/sq. ft. (\$8.19 or greater)
Wall Insulation	\$0.46/sq. ft. (\$8.30 or greater)
Basement Insulation	\$0.43/sq. ft. (\$8.13 or greater or 18 cavity)
Central Air Conditioner Incentives	
Central Air Conditioner (15+ SEER)	\$93
Windows Incentive	
Windows	\$1.00/sq. ft. of windows installed
Low-Income Weatherization Program	

Pacific Power partners with local agencies to provide free weatherization services to income-qualifying homeowners and renters. Based on the home's needs, a variety of measures can be installed, including insulation, energy-efficient shower heads, LED light bulbs and more. All of these measures are designed to lower your electric bills while keeping your home comfortable. Learn more www.pacificpower.com/wattsmart/low-income.

TO LEARN MORE:

- Call toll free at 1-855-855-7231
- Email ps@pacificpower.com/wattsmart/low-income
- Online at www.pacificpower.com

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POWERING YOUR GREATNESS

1-855-855-7231 www.WattSmart.com

Figure D-3: Door Hanger

PEOPLES GAS[®] ENERGY EFFICIENCY PROGRAM NORTH SHORE GAS[®] ENERGY EFFICIENCY PROGRAM

Sorry we missed you

Don't miss out on energy savings!

We came by _____

Call **844-367-5867** to reschedule your appointment for your **FREE** and discounted energy-saving products and personalized energy assessment.

很遗憾我们错过了您，但是千万别错过节能机会。请致电 844-367-5867，以便重新安排时间，为您免费进行节能产品安装和个性化能源评估。

유기스립제도 귀하를 만나지 못했습니다. 그러나 에너지 절약 기회는 놓치지 마십시오. 844-367-5867 번으로 전화하여 무료 및 할인된 에너지 절약 제품 및 개인 맞춤형 에너지 평가를 위한 예약 일정을 다시 잡으십시오.

Szkoda, że nie udało nam się spotkać. Nie zapomnij jednak o okazji do zaoszczędzenia energii. Zadzwoń pod numer 844-367-5867, aby ponownie umówić się na BEZPŁATNĄ spersonalizowaną ocenę zużycia energii w Twoim gospodarstwie domowym oraz instalację bezpłatnych i zniżkowych produktów oszczędzających energię.

Sentimos no haberlo encontrado. Pero no pierda la oportunidad de ahorrar energía. Llame al 844-367-5867 para hacer otra cita para su evaluación y para recibir productos ahorradores de energía con descuento y de forma GRATUITA.

Terms and conditions apply. Offers subject to change. Installed products may vary. This program is funded by Peoples Gas and North Shore Gas customers in compliance with state law.

Video Production

Resource Innovations has successfully provided high-quality online technical and vocational educational and assessment solutions to our clients since 2018. The instructional videos we produced for the State of Utah Office of Energy Development (OED's) Code Training Program are [available on YouTube](#) and are linked to from the [Utah Energy Code](#) website.

These videos demonstrate our ability to offer online training for on-demand viewing and make virtual training events a reality. The trainings are executed through livestreaming and are recorded for on-demand viewing by attendees at their convenience. The training consists of integrated video presentations, including presentation slides, explanations, and examples from the instructor. Brent Ursebach and Mark LaLiberte are the instructors; and the subjects include "Top 5 Considerations When Building a Home," "Moisture Management in Homes," and "Energy Efficiency in Buildings."

Our experience producing online content includes producing several videos for the Commonwealth Edison (ComEd) retro-commissioning (RCx) and monitoring-based commissioning (MBCx) programs, including [this animated how-to video](#) on YouTube. Our team has created personalized project snapshot videos, like this example of [Michigan Plaza](#) in downtown Chicago, to highlight the customer experience while participating in the program, experience with their contractor, and their energy efficiency impacts.

Resource Innovations also implements ComEd's Small Business program. Our team has produced a variety of online content in support of the Small Business program, including, a [Program Overview video](#), and project snapshot videos for customers such as: [Hope House](#), [Superdawg](#), and [Sneaker Cleaners and the Calvary Memorial Church](#).

The videos are hosted on [a contractor website](#) that also includes an event calendar, program communications, trainings and webinars, tools and resources, and marketing materials.

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