

Category 1: Comprehensive Program Design

Company Characteristics:

1. Name, contact information, company, or organization that you represent.

Electric & Gas Industries Association (EGIA)

3800 Watt Ave., Suite 105

Sacramento, CA. 95821

(916) 609- 5300 Phone

(916) 609- 5350 Fax

www.egia.org

Type of Business: 501-(c)(6) non-profit organization

State of Registration: California

2. An overview of your approach to equity, diversity, inclusion, and accessibility (DEIA).

EGIA recognizes the importance of diversity. We believe that organizations and contractor delivered activities have a greater impact when different ideas, perspectives, and backgrounds are brought together to learn from and support one another. We are proof, and so are our member contractors, that diverse organizations are in a better position to succeed and evolve.

EGIA seeks to work with diverse partners in situations where a partner brings additional capabilities to our team that will benefit our client and program.

3. As applicable, a short description and a link to programming that your company is contracted or has been contracted to implement for planning, administering, and/or field delivery of federal or state programs. Note which, if any, provides low- and moderate income and affordable home energy upgrades, especially with and in disadvantaged communities.

EGIA is a nationwide nonprofit organization dedicated to contractors' success. EGIA serves a network of over 10,000 contracting companies including HVAC, home performance, insulation, windows, solar and other companies installing high efficiency product solutions. EGIA has developed extensive relationships with contractors, regional distributors, and product manufacturers delivering unparalleled solutions that include world-class business education & training, customer financing solutions, groundbreaking industry trend research.

Additionally, through the EGIA Contractor University www.MyContractorUniversity.com online business training platform EGIA delivers training to tens of thousands of contractors, distributors, manufacturers and their employees each year providing business optimization, leadership, sales, marketing and technical skills education.

Through EGIA administered financing, EGIA has facilitated over 450,000 residential and business projects valued in excess of \$8.3 billion and administered over \$1.5 billion in energy efficiency and water conservation rebate payments. is currently facilitating financing in excess of \$750 million annually in residential and business energy efficiency projects. The EGIA OPTIMUS platform www.OPTIMUSFinancing.com is perfectly tuned to deliver financing to the entire customer spectrum

including low and moderate income consumers and is currently delivering approval rates in excess of 90%.

EGIA is also a recognized leader in delivering sponsored demand side management and resource efficiency services on behalf of electric, gas and water utilities and government agencies. EGIA services include financing, rebate program administration and rebate processing, trade ally network management, training, and sales channel development. EGIA has processed over one million residential and commercial rebate applications, distributing over \$1.5 billion in resource efficiency rebate payments. www.egia.org/utility-services/rebate-administration

Examples of programs currently administered by EGIA include:

Program Name	Program Description
SoCal WaterSmart Region-Wide Residential & Commercial Rebate Program www.socalwatersmart.com	<ul style="list-style-type: none"> • Implement residential and commercial conservation rebate program. • Implement online rebate estimator, rebate reservation and application program. • Provide bilingual contact center services. • Process and pay thousands of rebate applications annually. • Develop all program marketing and educational materials (point-of-sale, promotional, website, fact sheets, advertising, etc.).
SCAQMD CLEANair Furnace Rebate Program www.cleanairfurnacerebate.com	<ul style="list-style-type: none"> • Administer the residential high efficiency furnace program. • Implement online rebate application system. • Manage disbursement of rebate funds. • Provide customer service through the EGIA Contact Center.
GoGreen Financing www.gogreenfinancing.com	<ul style="list-style-type: none"> • Contractor manager for statewide program providing energy efficiency financing backed by the State of California • Implementation of online contractor CRM solution
JEA Residential Rebates www.jearesidentialrebates.com	<ul style="list-style-type: none"> • Implement online rebate application system. • Review and process residential rebate applications.

Program Goals

4. How would you describe the goals of this program design? What kind of market transformation are you looking to achieve?

The Homes and HEEHR programs (programs) are designed to minimize energy burdens and costs by buying down the capital acquisition costs for energy efficiency upgrades to residents of single and multi-family homes.

The programs will support market transformation by facilitating an increase in the purchase of heat pumps in place of gas fired furnaces, an increase in building weatherization projects, and the adoption of home certification standards that tie increases in real estate value to the installation of these measures.

5. Does your program address a specific building type? If yes, which?

EGIA's program design aligns with the goal of the programs in addressing single family and multi-family building types. EGIA has a long history administering programs targeting these building types and has included best practices learned through that experience in our design.

6. Does your program target a particular income level? If yes, which? If not, what income levels can your program effectively reach?

EGIA has extensive experience serving customers at all income levels including low and moderate income categories through the delivery of financing solutions, program administration, rebate processing, marketing, consumer and contractor recruitment activities.

7. Does your program design address HOMES, HEEHR, or both?

EGIA's overall program design framework supports both programs. However, EGIA will need to develop specific individualized program delivery processes to incorporate the unique design of each program.

8. If your program design addresses HOMES, are energy savings measured, modeled, or both?

EGIA's program design utilizes our proprietary Rebate Processing System that supports participation through both measured and modeled paths. We believe that allowing both paths is critical to assure the widest participation.

9. Does your program design promote any efficiency or electrification technology in particular? How will you determine which technologies are eligible for rebates?

EGIA will work with the appropriate agencies (DOE, State Energy Office, others) to establish eligibility requirements for technology included in the program. We have extensive experience working with manufacturers of HVAC and other relevant products, and organizations such as Energy Star, AHRI, and HARDI to develop Qualified Product Lists (QPLs) that create the opportunity to deliver optimal program participation and program goal attainment. The EGIA RPS provides single sign on capabilities to facilitate a wide variety of QPLs in a single customer application.

Market Conditions

10. What market conditions are necessary for your program design to be successful? What policies are necessary? What relationships? (E.g., relationships with utilities, relationships with appliance manufacturers, building envelope technology manufacturers, data access policies, relationships with local and county governments, consumer access to internet, consumer access to big box retailers.) If these conditions are not available, how would a state create them?

As the largest and fastest growing contractor training and development organization in the industry EGIA brings a longtime working relationships with manufacturers, distributors, big box and local retailers and installing contractors of home services products into our administration of the programs. We understand that program processes must fit within the existing sales processes of these organizations to make their participation "worthwhile". Our design will balance the processes required to meet measurement and verification requirements with delivering a consistent, easy to use program that program participants and the supply chain need to deliver projects.

11. How would building permits and inspections impact the program?

Building permits and inspections by local permitting authorities are typically the responsibility of the customer and their installation contractor. The ERPS can validate that permits have been pulled, as well as scheduling Quality Assurance inspections to prevent fraud or other misuse of the program.

Implementation Proposal**12. Describe your vision for implementation in as much detail as possible. Include:**

- a) A description of the program concept. Who pays whom, when, for doing what (including eligible measures, income strata/customer types, incentive strategies, certification of work completed, contractor training and management, quality assurance, recycling of existing appliances and equipment, and funding leverage)**

EGIA can either be contracted by the State Energy Office (SEO) as Statewide Program Administrator or provide components of the overall program delivery. The SEO will pay EGIA for delivery of these services. Its also recommended that the SEO establish a pre-funded rebate account to enable EGIA to pay rebates to customers and contractors in the timeliest manner.

Turnkey program services include:

- Administration of program goals and budgets.
- Program marketing services including website design, digital marketing, and marketing collateral.
- Development and delivery of contractor training content through Contractor University.
- Contractor, manufacturer and distributor engagement, recruitment, and training.
- Application review and processing via online portal, fax, mail, or email submission.
- Integration of customer eligibility tools that may be provided by the SEO.
- Payment of customer and contractor rebates via check or ACH.
- Customer qualification, targeted outreach, and education.
- Quality assurance supported by a third-party subcontractor.
- Project certification when required through an approved organization integrated into the program process.
- Contact Center staffed by trained and experienced EGIA employees.
- Integrated financing solutions.

- b) A description of the participant journey through the awareness, application, participation, and close out process (including money flows and options for stacking rebates and financing)**

- EGIA will create a marketing plan to develop awareness of the program to all qualifying customers, equipment manufacturers, distributors, retailers and contractors.
- EGIA will utilize Contractor University to train contractors on program requirements.
- Customers or contractors will submit applications to EGIA for completed projects.
- EGIA will review that projects meet all program guidelines and follow up with the customer or contractor regarding any discrepancies or missing information. QA checks and possible field inspections will occur at this stage.
- EGIA's rebate processing system facilitates rebate stacking when allowed within program guidelines.

- EGIA will notify the customer or contractor of approved or denied application within 30 days of receipt of application.
- EGIA will remit payment to the customer or contractor within 3 days of receipt of rebate funds from the SEO. Utilization of a prefunded rebate account ensures that this will fall within 3 days of approval of the application.

c) A description of the roles and responsibilities of all parties involved in the process, including the responsibilities of the State Energy Office

EGIA will perform tailored delivery of the above referenced services. SEO staff will provide program management input and guidance throughout the lifecycle of the program.

d) A statement of the benefits and comparative advantages of this program concept (including grid impacts related to electrification, ability, or inability to cover a state's entire geography)

EGIA is a national organization with deep experience in administering regional and statewide programs. EGIA previously implemented statewide programs under the American Recovery and Reinvestment Act in IL, PA and WY. Additionally EGIA has delivered statewide resource efficiency programs in CA. Selection of EGIA as a Program Administrator will ensure consistent delivery of program services throughout the program which will minimize confusion by contractors and other organizations that serve multiple areas of the state.

e) A description of any secondary market implications (e.g., reselling energy savings)

EGIA will work with the SEO and other relevant stakeholders to identify and react to other market implications.

Types of Implementation Partners

13. Types of partners, businesses or other entities will be necessary for program implementation (Do not specify a third-party name. NASEO may delete your entire submission if a specific third-party name is included).

EGIA will work with partners as needed to ensure the effective delivery of all program elements. EGIA will actively look for partners with DEI certification when the need for a partner is identified.

Partnership opportunities include:

- External QA and field inspection providers.
- Engineering services.
- Organizations currently providing services to low and moderate income customers who can support identification of eligible customers, customer recruitment and field outreach activities.
- Relevant industry associations.
- Project certification organizations.

Category 3: Indication of Vendor Interest

22. Name, contact information, company, or organization that you represent.

Eric Hatton
Vice President, Utility and Government Services
3800 Watt Avenue, Suite 105
Sacramento, CA 95821
(517) 917-6700
ehatton@egia.org

23. An overview of your approach to equity, diversity, inclusion, and accessibility (DEIA).

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EGIA seeks to contract with diverse partners in situations where a partner brings additional capabilities to our team that will benefit our client and program. EGIA also has a strong record of delivering program services to diverse communities through our long history of program administration.

24. As applicable, a short description and a link to programming that your company is contracted or has been contracted to implement for planning, administering, and/or field delivery of federal or state programs. Note which, if any, provides low- and moderate-income and affordable home energy upgrades, especially with and in disadvantaged communities.

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EGIA is also a recognized leader in delivering sponsored demand side management and resource efficiency services on behalf of electric, gas and water utilities and government agencies. EGIA services include financing, rebate program administration and rebate processing, trade ally network management, training, and sales channel development. EGIA has also facilitated the financing of over 450,000 residential and business projects valued more than \$8.3 billion and administered over \$1.5 billion in energy efficiency and water conservation rebate payments.

Examples of current programs with brief description and link can be found in the response to Category 1, Question 3.

Company Summary

25. Summarize the services your company or organization could provide to a State Energy Office in the execution of these programs.

EGIA has experience providing the following services to utility and government clients:

- Rebate program administration
 - Budget and goal management
 - Reporting and data management system
 - Online and hard copy application development
 - Application processing utilizing the proprietary EGIA Rebate Processing System
 - Rebate fund disbursement
 - Bilingual contact center services
- Trade ally recruitment, engagement, and training
 - Contractors
 - Distributors
 - Manufacturers
 - Certification partners
 - Training content delivered through the EGIA Contractor University Learning Management System
- Targeted program marketing
 - Website development and management
 - Digital marketing
 - Program collateral development
 - Full creative services in house
- Residential project financing program implementation
 - Utilizing the EGIA OPTIMUS financing platform
 - Financing incentive processing
 - Interest rates buy-down administration

Proprietary Information Statement

EGIA authorizes NASEO to publish and distribute this response to the NASEO RFI on its website and through other means to the states and general public. We have included no confidential or proprietary information in our response.

X *Eric Hatton*

Eric Hatton
Vice President, Utility & Government Services