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Thank you for the opportunity to respond to this RFI. We are pleased to provide the following response and look forward to discussing our products, services, and capabilities with any interested party to the state's HEEHR or HOMES programs whether state energy office officials or third-party consulting / contracting firms.

There is no proprietary or confidential information included herein and this response is suitable for public dissemination by NASEO.

Category 1: Comprehensive Program Design

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Incentit is committed to advancing diversity, equity, inclusion, and accessibility within our organization including any staffing decisions made because of, or otherwise independent of, our involvement with any state energy office program.

Implementation Proposal #1

Fully Integrated End to End Point-of-Install Program with an Option for Multi-Level and Multi-Utility Collaboration

{Visuals provided in Category 2 below}

This implementation proposal is specific to the HEEHR point-of-sale program. It's a fully integrated multi-tool program design addressing all program actors including customers, dealers/installers, and program administrators. A key distinction to this proposal is that it's truly a "point-of-install" program for professionally installed devices such as space heat pumps, heat pump water heaters, electrical work, and weatherization improvement tasks.

The customer journey begins with an online pre-application through our customer-facing *AppCentral* claims portal. We believe a pre-application process to be an effective way to set proper customer expectations and to avoid having the dealers/installers pre-qualify customer eligibility. The pre-application will call for all the information and evidence documentation necessary to determine the customer's eligibility. Each pre-application will be fed back to *Incentit*, the program administrator's management system. Once the pre-application has been accepted, Incentit will send the customer an email notification with their approval code.

Next, the customer selects their dealer/installer and provides them with their approval code. The installer completes the job and submits the installation notification through the *DSMally* mobile app. The installation notification will be fed back to *Incentit*, where a rebate application request record is generated using the customer information, dealer/installer information, equipment information, and other required information. The new installation notification will capture evidence of a completed job including a GPS tagged photo and customer e-signature from the app. The rebate request record will store the appropriate incentive amount, kWh energy saved, kW peak avoided and any other traits that may be required for fulfillment and reporting. The program administrator will have access to the customer pre-application and installer's notification, including the install evidence, in perpetuity. Therefore, each program administrator can choose their own QA model whether that is spot-checking or



to bulk approve, hold-back and true-up.

Some point-of-install programs may be delivered at the wholesale level (i.e. midstream). In these situations, *Incentit* can match the dealer's installation notification to the wholesaler's shipment record by model and serial number. This process auto-validates a midstream delivered program by only recognizing a sale once the equipment has been confirmed as installed.

At their option, state energy offices can choose to collaborate with the local utilities including the IOU's trade allies and/or the rural electric cooperative and municipal utility energy advisors. Here, the program administrator can utilize the shared *Incentit* environment where each rebate record can accommodate multiple levels of amounts. One amount would be the state's amount, and another would be the utility's amount. *Incentit* can accommodate up to three levels for those situations where the utility's power supplier also contributes.

At the end of each period, the program administrator will "close out and batch up" up all accepted rebate application request records. The closed incentives file shall be fed by API, or by spreadsheet file, to payment whether that is direct bank payment and/or third-party sender services. Because the point-of-install payment is made to the dealer/installer or wholesaler, *Incentit* shall publish a registration portal for those organizations to one-time register to participate in the point-of-install program. Their registration will create their user account on *DSMally* and will also ask for their remit information, a completed W9, and to accept the terms and conditions to participate.

- The primary goal of this proposal is to accelerate processing velocity to improve customer and dealer/installer satisfaction, yet still enable cost effective verification and QA.
- The secondary goal is to tether the rebate to "installed" products and not just "sold" products.
- This proposal is agnostic to building type.
- This proposal is agnostic to income level because the pre-application process determines eligibility, set's realistic customer expectations, and removes any possibility of error or fraud if the dealer/installer were to pre-qualify.
- This proposal is a fit for the HEEHR point-of-sale program but is truly a "point-of-install" program with guardrail rules and supporting evidence for effective QA.
- The energy savings is modeled and will embed formulae published through state TRMs or as otherwise provided by consultants.
- This proposal is agnostic to equipment type but it's conceivable that a program admin could require a pre-applicant or installer salesperson provide evidence of an existing fossil fueled device for an early replacement condition.
- The most critical condition would be promotional, including consumer awareness, enrolling point-of-install partners, and support. A second critical condition would be the state accepting the need for point-of-install partners to be funded quickly with backfill QA.
- On the mobile app installation notification, we can also ask for the permit number when applicable and for additional photos for enhanced desktop inspection.

Implementation Proposal #2

Home Retrofit Project Coordination Utilizing a Mobile App and Applying Conditions-Based and Formula-Driven Energy Impact

{Visuals provided in Category 2 below}

This implementation proposal is specific to the HOMES measured energy reduction rebate program. Like proposal #1, this proposal will also use all our tools including *AppCentral*, *DSMally*, and *Incentit*. A key

distinction to this proposal is applying a formula editor to produce audit-conditions based and formula driven energy savings opportunities and outcomes, and to enable the calculating of savings-based rebate amounts.

The customer journey begins with an online sign-up to participate through *AppCentral*. The sign-up is fed back to *Incentit* where the project coordinator can determine eligibility and oversee an accepted project through to conclusion. Next, the coordinator will assign the job to an auditor or home performance contractor. The auditor or contractor receives a task notification by email and opens up *DSMally* to see the new task that has been assigned to them.

The coordinator (or auditor / contractor) contacts the homeowner to schedule the audit. They perform the audit which can include both a walk-through and measurements, or just a walk-through. The audit data is recorded through *DSMally* and is fed back to *Incentit*. Once the audit data is submitted, *Incentit* processes all eligible improvement tasks through the formula editor and returns the full listing with the audit-conditions based modeled kWh savings, kW avoided, and therm savings. The coordinator (or auditor / contractor) scopes out the retrofit by choosing which improvement tasks to implement using the audit-conditions based energy savings opportunities and available funds.

Because the modeled energy savings is based on the known audit conditions, the rebate amount can be calculated based on that modeled savings.

The contractor performs the job, opens *DSMally* to mark the chosen improvement tasks as complete, captures GPS tagged photo evidence, and captures the customer e-signature on the app as acknowledgement of a completed job.

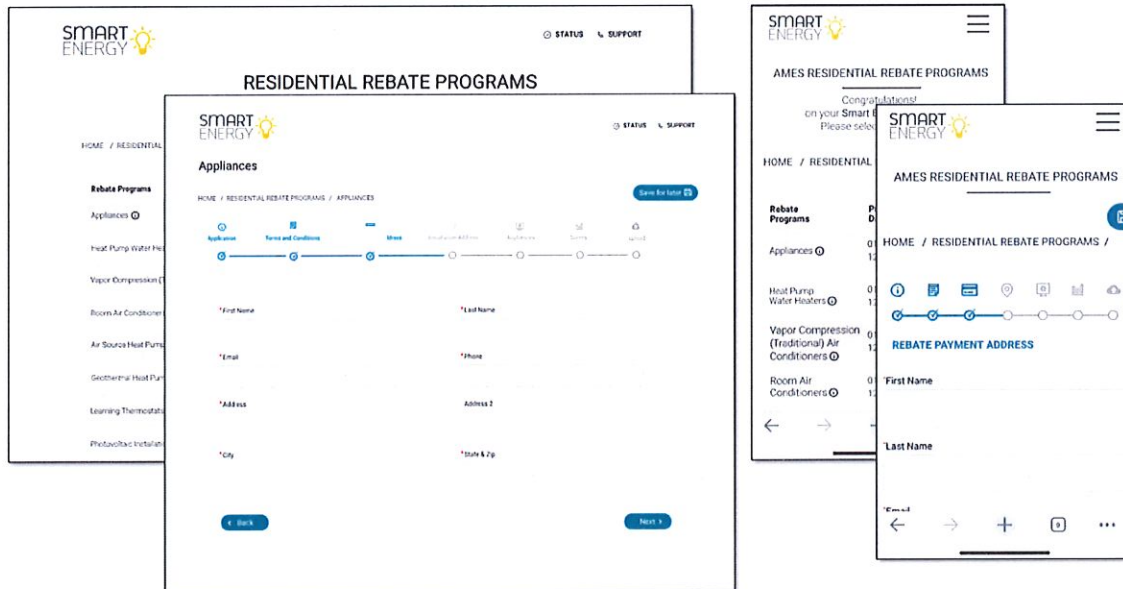
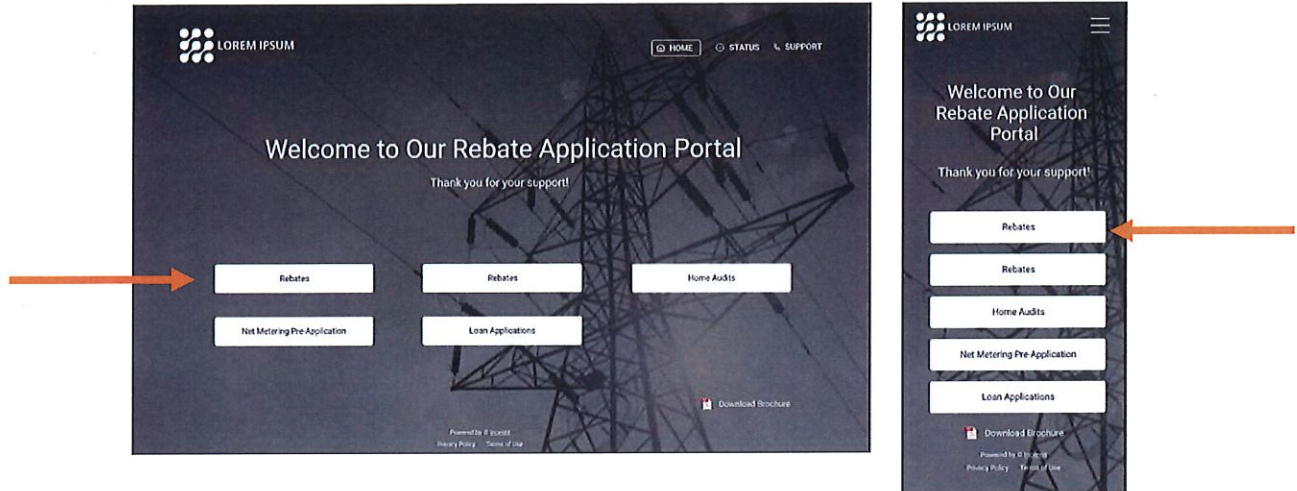
Finally, the project coordinator routes the job through *Incentit* to completed status, at which time an rebate record is generated that includes the customer information, contractor information, and a summary of the rebate amount, kWh savings, kW avoided, and therm savings for all the completed improvement tasks. The closed incentives file shall be fed by API, or by spreadsheet file, to payment whether that is direct bank payment and/or third-party sender services.

- The primary goal of this proposal is to enable audit-conditions based and formula driven energy savings opportunities and outcomes.
- The secondary goal is to enable a program administrator and project coordinator to calculate a rebate amount based on modeled savings.
- This proposal is specific to existing home energy retrofits.
- This proposal is agnostic to income level because the sign-up process determines eligibility.
- This proposal is a fit for the HOMES measured energy reduction rebate program.
- The energy savings is modeled and will embed formulae published through state TRMs or as otherwise provided by consultants. The formula editor can use either measured inputs or TRM/consultant provided assumed factors.
- This proposal is agnostic to the chosen list of eligible improvement tasks provided there exists modeled savings formulae.
- The most critical condition would be project coordination and customer promotion.

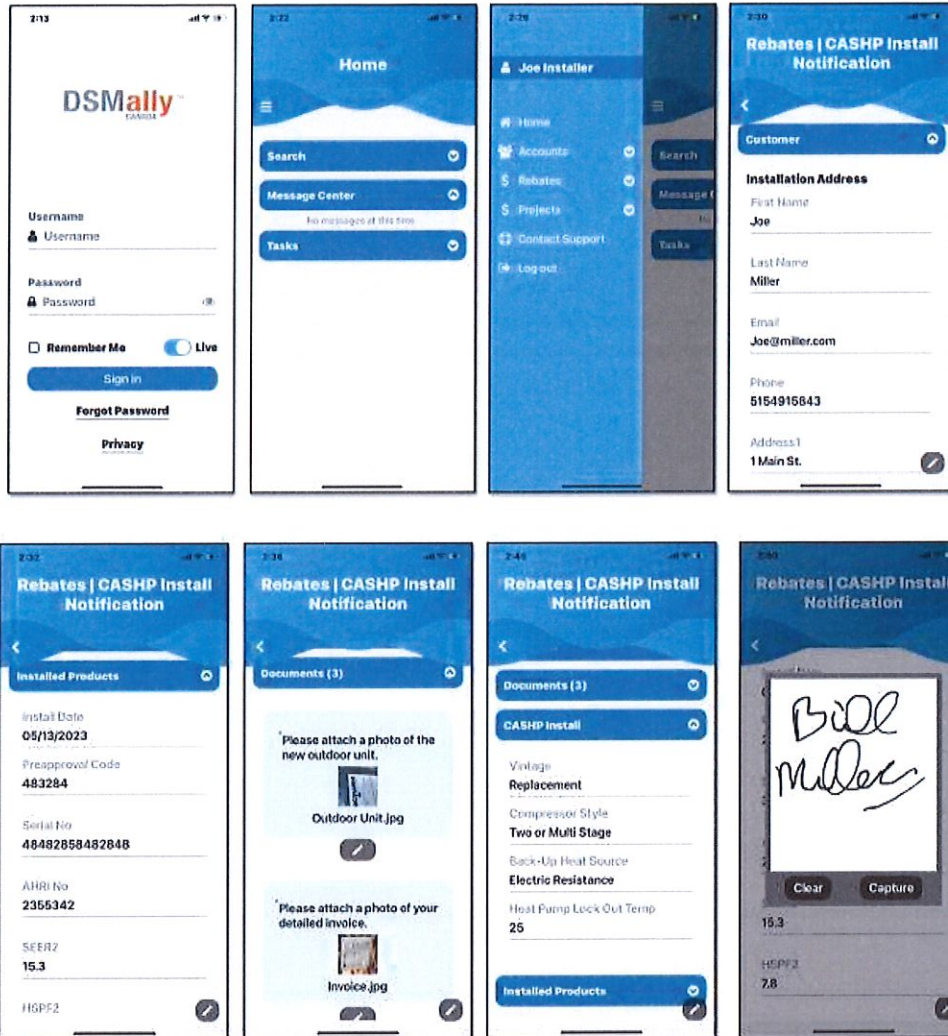
Category 2: Program Elements

Fully Integrated End to End Point-of-Install Program with an Option for Multi-Level Local Utility Collaboration

AppCentral Pre-Application



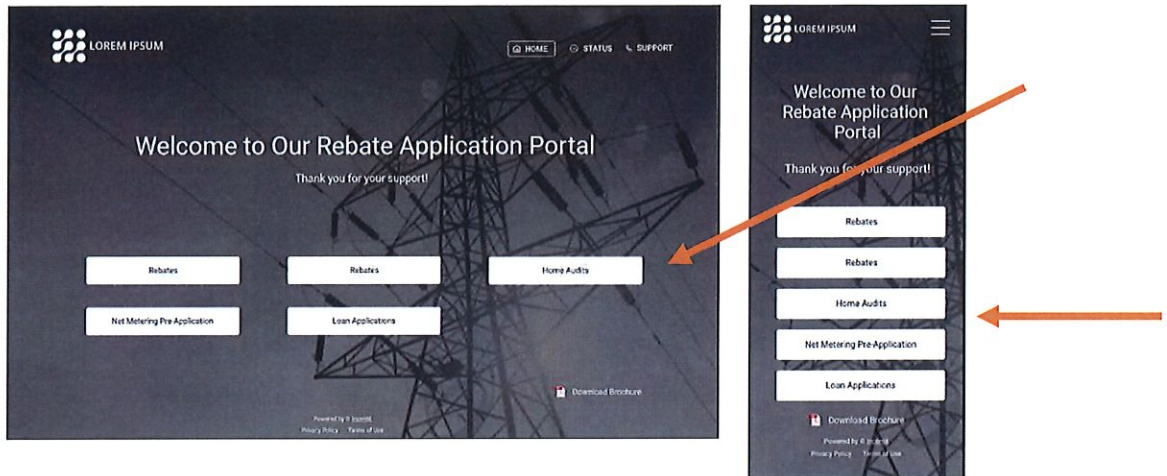
DSMally Install Notification



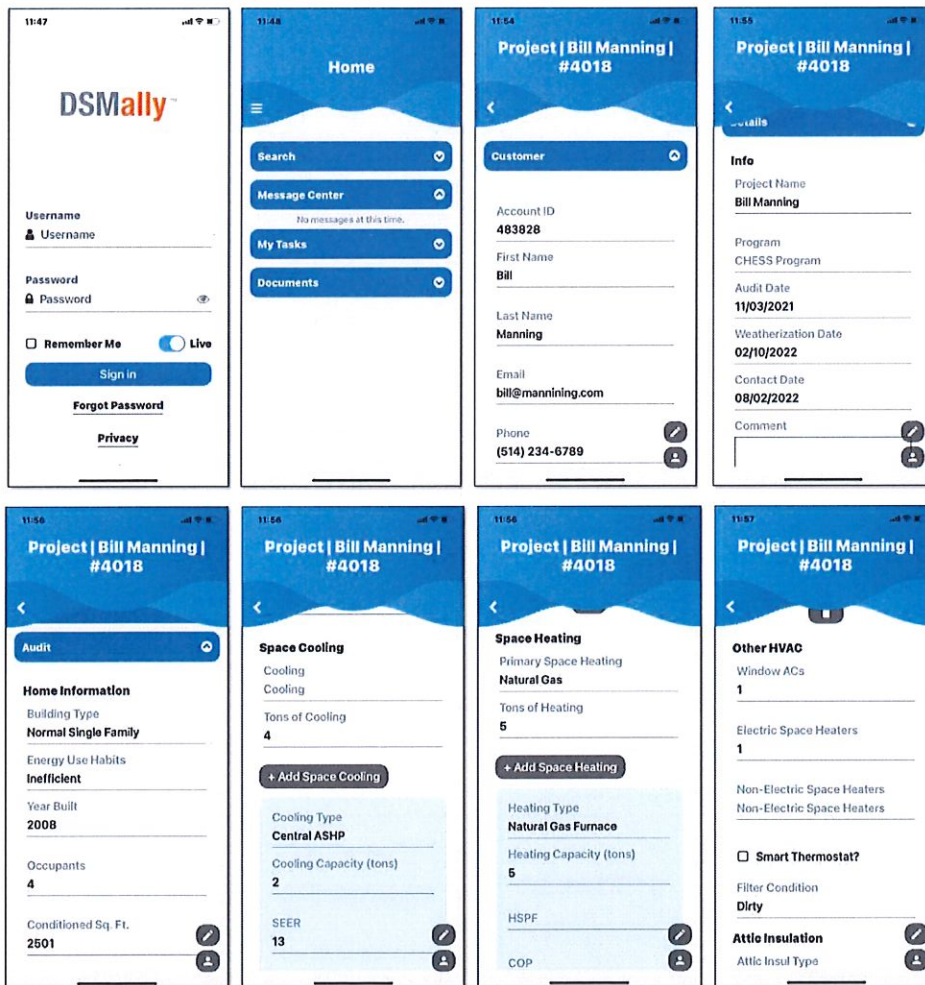
Incentit Multi-Level Multi-Utility Program Administration

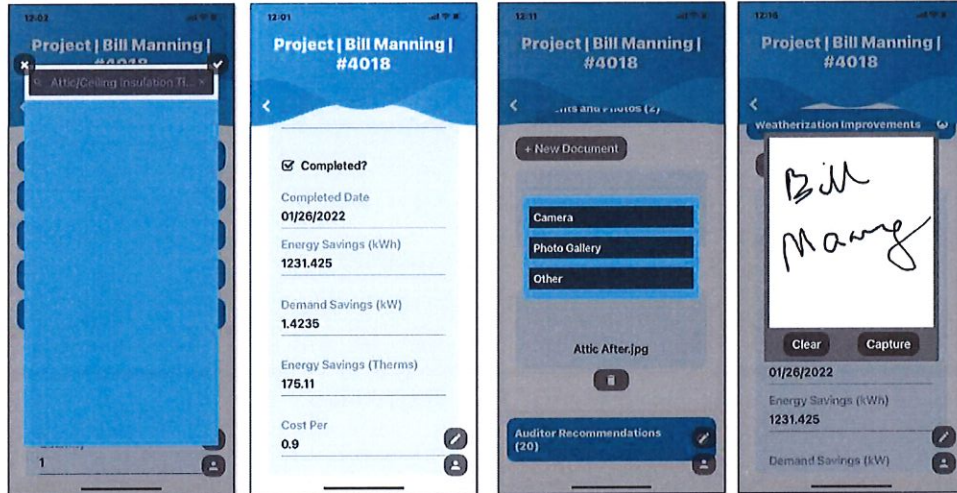
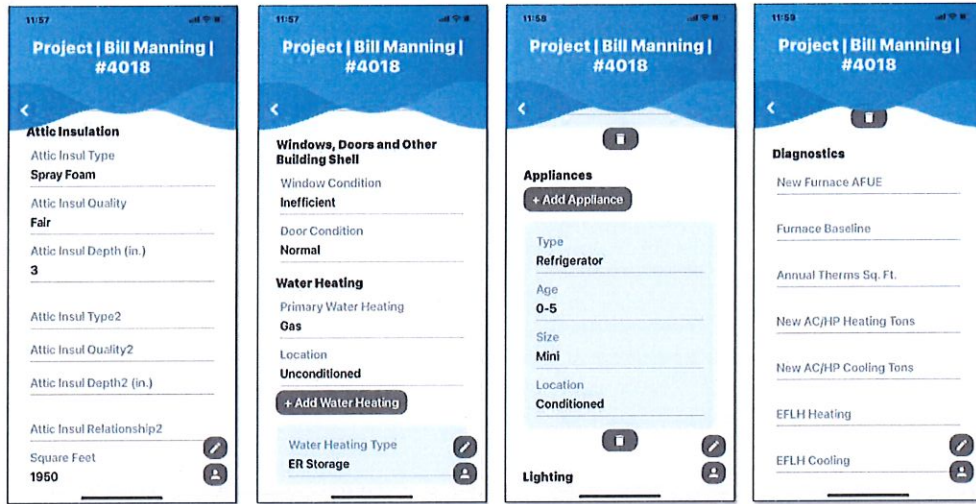
Account ID	Amount 0	Tier 1 Amount 0	Tier 2 Amount 0	Amount Formula 0	Tier 1 Amount Formula 0	Tier 2 Amount Formula 0	Is Active?
Adams Colandrea	1.00	1.00	1.00	[Size]*130	[Size]*0	[Size]*130	Y
Alankovse Clayton	1.00	1.00	1.00	[Size]*130	[Size]*0	[Size]*130	Y
Arcadia	1.00	1.00	1.00	[Size]*130	[Size]*0	[Size]*130	Y
Barton	1.00	1.00	1.00	[Size]*130	[Size]*0	[Size]*130	Y
Bayfield	1.00	1.00	1.00	[Size]*130	[Size]*0	[Size]*130	Y
Central Wisconsin	1.00	1.00	1.00	[Size]*130	[Size]*0	[Size]*130	Y
Chippewa	1.00	1.00	1.00	[Size]*130	[Size]*0	[Size]*130	Y

Home Retrofit Project Coordination Utilizing a Mobile App and Applying Conditions-Based and Formula-Driven Energy Impact



DSMally Audit Data and Improvement Tasks





Incentit Conditions-Based Formula-Driven Energy Savings Opportunities

System Region	Incent	IE Market	Kel College	Southgate Forks	W5	Zone	Electric Heat	Insulation Tech	Compliance	ESMiles	Compart	Tax	Cooking	Ethanol (ET71)	MSAgo - Tools	Vehicle Safety
Energy Saving Opportunities																
Calculations																
Attic R Value																
11.1																
Attic R Value 2																
No Value (Data Missing)																
kWh Attic/Ceiling Insulation Tier 1 (R0-R10)																
1231.425																
kW Attic/Ceiling Insulation Tier 1 (R0-R10)																
1.4235																
Therms Attic/Ceiling Insulation Tier 1 (R0-R10)																
175.11																
kWh Attic/Ceiling Insulation Tier 2 (R11-R20)																
561.1325																
kW Attic/Ceiling Insulation Tier 2 (R11-R20)																
0.67225																
Therms Attic/Ceiling Insulation Tier 2 (R11-R20)																
79.6375																
kWh Attic Insulation Defects																
0.923																
kW Attic Insulation Defects																
0.0007																
Therms Attic Insulation Defects																
0.105																
<input type="button" value="Back"/> <input type="button" value="Save"/> <input type="button" value="Approve"/> <input type="button" value="Return"/>																
Status: Audit Data																



Category 3: Indication of Vendor Interest

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Incentit is committed to advancing diversity, equity, inclusion, and accessibility within our organization including any staffing decisions made because of, or otherwise independent of, our involvement with any state energy office program.

Incentit develops and delivers incentive program implementation tools to program administrators and third-party implementation contractors. And we self-perform program mobilization services for certain right-fit clients. We currently offer the following products and services:

1. AppCentral is a customer facing application portal for point-of-sale preapplications, traditional rebate applications, audit sign-ups, loan applications, and other application types.
2. DSMally is mobile app for new installation notifications and audit data collection, which can be used to capture installation evidence and traits for a point-of-install program and/or audit conditions and proposed retrofit work for a modeled energy savings program.
3. Incentit is multi-level multi-utility incentive program administration and reporting system where state energy offices can elect to collaborate with an unlimited number of local utilities and where up to three incentive levels can be accommodated.
4. Incentit also has an audit-conditions based and formula-driven home audit and weatherization system that applies state TRM or consultant provided formula for model energy savings opportunities and to report on final outcomes.
5. Custom software and mobile app development to program administrators and program implementation contractors.
6. New program start-up and mobilization services for rural electric cooperatives, municipal utilities, municipalities, and other agencies that large national and international firms are unwilling to support.

Incentit 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.

Respectfully Submitted,

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