



Response to NASEO HOMES and HEEHR Program RFI

Implementation Options for Home Energy Performance-
Based Whole-House Rebate Program and High-Efficiency
Electric Home Rebate Program

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Resource Innovations is attaching our response to your Request for Information (RFI) for Implementation Options for Home Energy Performance-Based Whole-House Rebate Program (HOMES) and High-Efficiency Electric Home Rebate (HEEHR) Program. As the industry leader providing rebate processing services for energy efficiency programs, we are pleased to offer our insights and expertise. We are responding to Category 2 – Program Elements and Category 3 – Indication of Vendor Interest in NASEO’s RFI.

We appreciate NASEO’s efforts in promoting sustainable energy solutions throughout the country and believe that your goals align well with the foundational pillars that we use to guide the strategy and management of our company:

Resource Innovations 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.

Our primary point of contact for this opportunity is JP Harper, Senior Vice President. He can be reached directly at 215.327.0523 or RI.BD@resource-innovations.com.

Sincerely,



Lauren Casentini
CEO, Resource Innovations

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Resource Innovations understands that our response will be posted on the NASEO WEBSITE to support State Energy Offices in program design. We further understand that our responses will be accessible to the general public. Therefore, no proprietary or confidential information is included in our response and is suitable for dissemination by NASEO.

Category 1: Comprehensive Program Design

Not applicable. Resource Innovations (RI) works collaboratively with our clients to develop custom program designs that meet the needs of program stakeholders and their constituents. Therefore, we are only responding to Category 2: Program Elements and Category 3: Indication of Vendor Interest.

Category 2: Program Elements

Company Characteristics

16. *Name, contact information, company, or organization that you represent.*

The Resource Innovations contact is JP Harper, Senior Vice President. You can reach JP at 215.327.0523 or via email at RI.BD@resource-innovations.com.

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

RI is a woman-led business and is committed to DEIA as one of its guiding principles. To support our DEIA focus, RI:

- Partners with local diverse businesses and community-based organizations to support the programs that we implement
- Hires program delivery teams that reflect the diversity of the customers that we serve
- Helps service providers attain DBE certifications
- Joins and participates in organizations such as the NMSDC, the WBENC, the California Public Utilities Clearinghouse, and the National LGBT Chamber of Commerce (NGLCC) to identify and certify small and diverse businesses.
- Hires multi-lingual call center staff
- Uses a 3rd party language line service to ensure we can serve all customers
- Provides DEIA training to all employees and intensive customer service training to our call center staff
- Establishes corporate DEIA goals to ensure that we incorporate DEIA principles into every program we design and throughout our company including hiring, training, and company culture.
- Embraces federal, state, and local laws that support equal employment opportunities (EEO) in every location that we serve.

18. 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.

RI has vast experience implementing residential rebate programs that are similar to the HOMES and HEEHR programs for state and local utilities throughout the United States. We are currently implementing 13 programs that target individuals with low- and moderate-incomes in Arkansas, California, Illinois, Kansas, Missouri, and Virginia. The programs that we administer on behalf of our utility clients, are below. See the Appendix for program descriptions.

- Arkansas - Entergy Arkansas - Residential Low-Income Solutions (2020 – 2022)
- California - Pacific Gas & Electric's (PG&E) Energy Savings Assistance (ESA) program in the Bay Area and Central Valley Regions (2018 -Present)
- Illinois
 - Ameren Illinois and Nicor Gas – Energy Efficiency Offering (2018 – 2025)
 - Ameren Illinois Market Development Initiative (2016 – Present)
 - ComEd – Income Qualified Program (2018 – 2021)
 - ComEd – Home Energy Savings (2022 – 2025)
 - ComEd Whole Home Electrification Program (2022 -2025)
 - Nicor Gas – Multi-family Energy Savings (2022 - 2025)
- Kansas and Missouri - Ameren Missouri – Single Family and Multifamily Income Eligible Programs (2019 - 2024)
- Virginia – Dominion Energy Virginia:
 - Income and Age Qualifying Home Improvement Program (2015 - 2025)
 - EnergyShare Program Weatherization Services (2015 - 2023)

Program Elements

19. Describe the program element that is important for State Energy Office consideration. Be as detailed as possible.

The following program elements are essential to successfully implementing turnkey HOMES and HEEHR programs:

- Vast experience implementing programs for people with low and moderate incomes
- Proven trade ally network recruitment and management capabilities

- Established commitments and proven results working with diverse businesses and environmental justice communities
- Turnkey rebate processing and administration capabilities that with an ability to fulfill rebate applications within 2 business days
- Best in class integrated data management and reporting software system capabilities that are easily configurable to HOMES and HEEHER program requirements and offer visibility into program status and progress toward goals

Other

20. *Any additional comments.*

None.

RFP and Contract Language

21. *Any RFP language that could be used to execute your program idea.*

We recommend that state procurement officials include the following information in their RFPs:

- Diversity spend requirements (if any)
- Key Performance Indicators (KPIs)
- Program implementer experience criteria
- Participant eligibility requirements
- Program budget
- Proposal evaluation criteria and scoring methodology
- Software and data security requirements
- Data management and reporting requirements
- Program goals
- Target market

Category 3: Indication of Vendor Interest

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- Virginia – Dominion Energy Virginia:
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 - EnergyShare Program Weatherization Services (2015 - 2023)

Company Summary

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

Ri can provide the State Energy Office with a full continuum of services to execute the HOMES and HEEHR programs. Our turnkey implementation solution includes:

- Comprehensive program management
- Marketing and outreach
- Trade ally recruitment and management
- Incentive processing and rebate fulfillment
- Customer service call center
- Data management and reporting using our proprietary iEnergy software solution
- Manufacture and technology coordination
- Market assessment and launch plans

We are helping utility clients across North America achieve their energy efficiency goals through DSM program administration and support.

Appendix – Resource Innovations Program Description Summaries

Arkansas

Entergy Arkansas - Residential Low-Income Solutions (2020 – 2022)

As the administrator for this program, we offer individuals with qualifying low incomes in single-family home, manufactured home, and multi-family property energy efficiency upgrades. To support this program provides:

- Community outreach
- Customer enrollment
- Quality control inspections
- Project data management
- Energy savings calculations
- Effective Trade Ally recruitment and management

This contractor-driven program offers eligible customers free energy upgrades with Entergy paying 100% of measure and installation costs. Eligible measures include direct installs, duct work, attic insulation, light bulbs, smart thermostats, and \$500 toward health and safety measures like smoke alarms and dryer vent cleanings.

California

Pacific Gas & Electric's (PG&E) Energy Savings Assistance (ESA) program in the Bay Area and Central Valley Regions (2018 -Present)

Resource Innovations began implementing Pacific Gas & Electric's (PG&E) Energy Savings Assistance (ESA) program in its Bay Area Region in 2018 and in 2022, expanded our administrator footprint to include its Central Valley region. Resource Innovations manages day-to-day program operations, including tracking program performance, managing data in PG&E's Energy Insights platform, responding to client requests, and managing the client relationship. Specifically, we:

We also work with other market actors and stakeholders, including local community organizations, to improve how the ESA Program coordinates with these important, embedded community resources.

Our subcontractor, The Ortiz Group, is a diverse owned business enterprise (DBE) that manages a closed network of local contractors responsible for customer outreach, enrollment, and project installations.

Illinois

Ameren Illinois and Nicor Gas – Energy Efficiency Offering (2018 – 2025)

Ameren Illinois and Nicor Gas worked with RI to design a program implementation framework to engage income-qualified customer in Bloomington-Normal. We coordinated with the utilities and provided, project tracking and management, trade ally and community-based organization (CBO) recruitment and management, and data management/reporting. We provide CBOs and trade allies with mobile tools to support their field work.

We leveraged CBO relationships and recruited local trade allies, including a local minority-owned business with interest in and ability to expand into a general contractor role, to install gas and electric weatherization measures and to test different engagement strategies for hard-to-reach communities. The program offers CBOs compensation for their outreach work and helps support market development for local contractors working to build and expand their businesses. The community-based outreach approach leverages the partners' expertise and existing relationships with their clients to collaboratively develop a tailored outreach approach that identifies and effectively reaches those customers with the greatest need. In 2020, the project completed more than 100 joint gas-electric whole home weatherization projects in the area at no cost to the customer.

Ameren Illinois Market Development Initiative (2016 – Present)

We coordinate with CAAs and CBOs to identify new outreach and service opportunities Ameren Illinois can help fund to support underserved communities. We work with CBOs to design projects that complement the work they already do and engage customers they are already focused on serving with new electric energy efficiency opportunities. We support CBOs as they implement their projects by helping them work through roadblocks, finding creative solutions, and guiding them to the right resources.

ComEd – Income Qualified Program (2018 – 2021)

RI worked with the CAAs to adapt their current IHWAP-focused efforts for utility energy efficiency purposes, building out reporting methodology and working within program guidelines to maximize savings. We partnered with the CAAs to:

- Conduct community outreach and customer enrollment
- Deliver comprehensive single-family home and multi-family property retrofits to income qualified customers
- Provide qualifying homes with direct install and whole-building measures
- Complete quality control inspections

- Manage project data and calculate energy savings
- Coordinate with the IHWAP administrator to leverage federal and state funding for retrofit projects

Specifically for the multi-family sector, RI worked with CAAs to qualify multi-family properties and scope comprehensive, cost-effective projects that maximize energy savings and tenant impact. Measures include comprehensive multi-family weatherization, HVAC including tenant-unit and central plant systems, direct install, appliances, health and safety improvements and custom multi-family measures. RI also managed custom measure engineering analysis and verification and supported the CAAs in their contractor engagement and coordination. In addition to energy savings goals, the program also delivered the following results:

- Health and Safety Measure Implementation: 99% of all projects resulted in the implementation of both an energy efficiency measure and a health and safety measure to improve the air quality within a customer's home.
- Incentive Spend: Per utility request, the program exceeded incentive spend by 19%.

During the mid-year goal evaluation across their portfolios, the utilities were delighted with the overspend and turned to this program for additional income eligible incentive spend to compensate for other underperforming programs.

ComEd – Home Energy Savings (2022 – 2025)

The Home Energy Savings program provides energy efficiency upgrade and retrofit services. The program provides free energy efficiency services and education to income eligible customers at or below 80% area median income. Home Energy Savings is a program delivered in coordination across ComEd, Nicor Gas, Peoples Gas, and North Shore Gas.

ComEd Whole Home Electrification Program (2022 -2025)

The Whole Home Electrification Program provides income-qualified residents across ComEd's service territory with a free technical assessment by a participating ComEd Energy Efficiency Service Provider (EESP). Customers are then eligible to receive no-cost ENERGY STAR®-qualified upgrades that may include heat pumps, heat pump water heaters, induction, or electric stoves, and electric or heat pump clothes dryers.

The program also offers no-cost building weatherization, and health and safety modifications required to safely and efficiently reduce reliance on fossil fuel energy sources, like gas and propane, for homeowners and residents in single and multi-unit homes in Chicago. These upgrades empower income-qualified customers to reduce their carbon footprint, energy

costs, and climate impact. ComEd is funding 100 percent of qualifying electrification upgrades for single-family homes. The goal is to touch 25 homes to start and ramp to 175+ over four years.

Resources Innovations identifies and pre-screens candidates for the electrification offering as part of our work through the statewide Home Energy Savings program. We are delivering the Whole Home Electrification Program in partnership with CMC Energy and community-based organizations throughout the ComEd service territory.

Nicor Gas – Multi-Family Energy Savings (MFES) (2022 - 2025)

In 2022, the Northern Illinois utilities, ComEd, Nicor Gas, Peoples Gas, and North Shore Gas, launched the joint Multi-Family Energy Savings (MFES) program as a collaborative effort among ComEd, Nicor Gas, Peoples Gas, and North Shore Gas. The program consolidates existing programs into a centralized offering. The offering has distinct channels for the public housing and income eligible sectors, including a program that leverages the Illinois Department of Commerce and Economic Opportunity's (DCEO) Illinois Home Weatherization Assistance Program (IHWAP). Resource Innovations has dual roles on the MFES portfolio, one as a program administrator on behalf of Nicor Gas, and one as direct implementer of the IHWAP Multi-Family offering as a subcontractor to Franklin.

As Administrator, Resource Innovations manages program reporting, performance tracking, and continuous improvement of the program on behalf of Nicor Gas. As implementer, we leverage our Community Action Agency (CAA) relationships to provide income eligible customers with air sealing, insulation, furnaces, thermostats, boilers, aerators, showerheads, pipe insulation, and other custom projects co-funded by the utilities and IHWAP.

Kansas and Missouri

Ameren Missouri – Single Family and Multifamily Income Eligible Programs (2019 - 2024)

To deliver the Ameren Missouri Single Family and Multifamily Income Eligible Programs offering we use community-focused engagement strategies that include partnerships with CBOs and purveyors of affordable housing to recruit eligible customers and properties. The objective is to message the program

The Single Family program offers customers a free home energy assessment and the direct installation of low-cost energy-savings products, including Tier 2 power strips, LEDs, high-efficiency showerheads and faucet aerators, and pipe wrap. The program also offers

comprehensive home energy upgrades, including HVAC system replacements and home infiltration measures – all at no cost. Homes may also be eligible to receive attic insulation, air sealing, duct sealing, water heater wrap, ductless heat pumps, furnace ECM blower motor retrofits, air source heat pump replacements and refrigerator replacements. We also offer central air conditioner tune-ups and smart “learning” thermostats.

The Multifamily program offers a similar property assessment at no cost with similar eligible measures. The outreach also aligns but requires additional business development to identify decision makers and negotiate project final scopes. The Multifamily program incentives are slightly lower and are designed to cover the cost of most in-unit direct install measures, while co-pays are required for the more comprehensive and less cost-effective measures, such as equipment upgrades and building shell.

The program can also address minor health and safety issues in homes, up to an average of \$500/home. RI partners with local contractors to perform the property assessments, collect the data necessary to specify the follow up work, and manage work through completion.

.Virginia

Dominion Energy Virginia – Income and Age Qualifying Home Improvement Program (2015 - 2025) and EnergyShare Program Weatherization Services (2015 - 2023)

The Dominion Virginia Power Income and Age Qualifying (IAQ) Home Improvement program helps qualifying low-income, customers aged 60 or older, disabled veterans, and other disabled individuals (receiving supplemental state or federal support) customers reduce energy expenses through the installation of common measures, such as LED lighting, showerheads, faucet aerators, water line pipe wraps, and attic insulation. The program is available to qualifying residents in single-family, multifamily, or mobile homes.

Resource Innovations provides program design and regulatory support. We also review, process, and approve Weatherization Service Provider (WSP) and customer applications; qualify, train, and educate WSPs on program processes and tools; inspect customer projects; and issue incentive checks.

Dominion’s EnergyShare Program Weatherization Services (ESWS) is a low-income program that complements the Income and Age Qualifying Home Improvement program by offering a more comprehensive set of measures for installation to a broader set of qualifying customer households. Through this offering, customers can receive floor insulation, air sealing, duct sealing, refrigerator replacements, and health and safety measures.

In 2022, we kicked off a program expansion for the IAQ work to include more expensive capital upgrades that align with the EnergyShare Program services. Our expanded contract with Dominion – including IAQ, ESWS, and a new solar program – will provide approximately \$60 million in incentives over three years to the low-income housing segment. Resource Innovations also used the geospatial analysis to recommend adjustments to eligibility criteria based on remaining program potential.





Submitted by:

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