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Maddie Koewler
Senior Program Manager
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Subject: NASEO Request for Information (RFI) - implementation of the Home Energy Performance-Based Whole-House Rebate Program (HOMES) and the High-Efficiency Electric Home Rebate Program (HEEHR)

RE: Indication of Vendor Interest

Date: May 19, 2023

Dear Maddie,

Aptim Environmental & Infrastructure, LLC (APTIM) appreciates this opportunity to respond to the NASEO RFI for Implementation of the Home Energy Performance-Based Whole House Rebate Program (HOMES) and the High-Efficiency Electric Home Rebate Program (HEEHR). APTIM is pleased to submit our credentials. Our team brings proven success in rebate processing, program awareness and adoption in low- and moderate-income households, and management and reporting of state and federal monies.

We appreciate the opportunity to work with the state agencies in coordination to deliver successful programs.

Sincerely,

Aptim Environmental & Infrastructure, LLC

A handwritten signature in black ink, appearing to read 'Brenda Hopewell', written over a light gray rectangular background.

Brenda Hopewell, Vice President, Energy Solutions

E-mail: brenda.hopewell@aptim.com | Direct line: 415.420.9909



Category 3: Indication of Vendor Interest

Company Characteristics

Contact Information

Name	Title	Contact
George Cornwell	Business Development Director Aptim Environmental & Infrastructure, LLC (APTIM)	1200 Brickyard Lane, Suite 202 Baton Rouge, LA 70802 Phone: 508.570.1919 Email: George.Cornwell@aptim.com

Diversity, Equity, Inclusion, and Accessibility Approach (DEIA)

APTIM's overall approach starts with collaborating with and coaching community-based organizations. This allows APTIM to understand the needs of each unique area. Programs should not be one-size-fits-all, they should start with the groundwork in understanding the needs of the communities that they serve. APTIM works with these local community-based organizations to deliver program education and outreach, driving participation. In addition, APTIM cultivates relationships with business incubators, main street associations, neighborhood associations, universities, and workforce-development partners.

APTIM recognizes that current workforces are not enough to deliver programs in every location. APTIM programs work with local agencies to develop program awareness, identify contractors, and recruit a new local workforce. Participating contractors not only benefit from APTIM extensive training courses and subject matter experts, but we also provide ongoing mentorship to ensure their ongoing success.

Description of Existing Work

APTIM brings extensive experience in managing energy efficiency and renewable energy funding and federal grant programs. APTIM has successfully managed more than \$1.5B in energy efficiency and renewable energy funds and more than \$30B in federal grant dollars, including \$100M in ARRA-funded statewide energy efficiency programs for Louisiana and Missouri. Annually, APTIM's programs touch more than 1 million households and 6,000 businesses while working with 2,000+ contractors that participate in the programs APTIM oversees.

Examples of APTIM's experience in managing statewide energy programs that include low- and moderate-income affordable home energy upgrades and working with disadvantaged communities include:



Wisconsin's Focus on Energy Program

Since 2011, APTIM has served as Administrator of Wisconsin's Focus on Energy program, the statewide energy efficiency and renewable energy program. As Program Administrator APTIM presides over incentive fulfillment, budget management, KPI achievement, and contractor and customer equity for a program meeting the needs of over 100 participating utilities. This program includes \$35M pilot budget dedicated to rural equity programs. More recently, APTIM's purview was extended to include administration of the HOMES and HEERHA programs for Wisconsin, per a Public Service Commission (PSC) order in April. APTIM's role will include designing the programs, developing outreach and marketing plans, overseeing compliance and financial management, and ensuring development of a tracking and reporting system. In the decision to fold these federal grant programs into Focus on Energy program administration, the PSC noted the successful administration of previous federal grant funds and effective management of rate payer funds by the Focus on Energy program, under APTIM's administration.

Entergy New Orleans and Entergy Louisiana Energy Efficiency Programs

APTIM serves as the Third-Party Administrator (TPA) for Entergy New Orleans' and Entergy Louisiana's energy efficiency programs. As TPA, APTIM is responsible for all participant and contractor recruitment, issuance of rebates and incentives, financial management, and tracking and reporting. To effectively manage these programs, APTIM developed a proprietary software tool to manage projects funded by these programs, allow for effective financial management and rebate processing, and provide real-time reporting and tracking dashboards to monitor the programs' results and effectiveness. This platform has now been successfully used in other programs, such as with Denver's Climate Action Rebate Fund Administration.

Louisiana ARRA Funding Administration

APTIM served as the lead agency in management of DNR's ARRA-funded SEP and EECBG programs. Through these programs, APTIM successfully delivered more than \$50M in funds to projects supporting households, small businesses, institutions, and local governments. In addition, one of APTIM's local management team, led ARRA-funded weatherization programs for the state.

Company Services

- ▶ Program Designs
- ▶ Tracking and Reporting
- ▶ Program Implementation
- ▶ Infield Support
- ▶ Program Administration
- ▶ Grant Application and Management
- ▶ Marketing and Outreach
- ▶ Software
- ▶ Training
- ▶ Quality Assurance and Control