

NASEO Request for Information (RFI) – Implementation Options for Home Energy Performance-Based Whole-House Rebate Program and High-Efficiency Electric Home Rebate Program

May 19, 2023

Category 3: Indication of Vendor Interest

Company characteristics

22. Name and contact information

Company: Canopy

Website: <https://canopyclimate.com/>

Contact email: hi@canopyclimate.com

Lauren Fraser, Director of Partnerships, lauren@canopyclimate.com

23. Approach to Equity, Diversity, Inclusion and Accessibility (DEIA)

Canopy is committed to equity and diversity and strives to promote inclusion and accessibility in everything we do. Canopy's online platform is fully functional and accessible via mobile devices, and we offer 1:1 concierge support at every step of the process for those who prefer to engage with a live human being to answer questions and offer advice. Personalization and customization is at the heart of our product. With each state and local community partner, we offer extensive customization of the platform, including adjustments to wording, images, recommendations and language translation to better address the needs and interests of local residents.

24. Programming Canopy is Contracted to Implement

Canopy currently has partnerships in place with corporations, community organizations, and government offices to provide the Canopy platform and concierge services to support their employees and local residents in the process of electrifying their homes and vehicles and to encourage the usage of current federal, state and local rebates, tax credits and other incentives to make electrification more affordable. These partnerships include low- and moderate-income and affordable home energy upgrades with and in disadvantaged communities.

Company summary

Canopy builds software to make home electrification easier and more affordable. Our mission is to reduce the 35% of total US emissions from residential cars and homes. We partner with cities, community organizations, utilities, and employers to speed adoption of EVs, e-bikes,

renewable electricity, rooftop solar, home batteries, induction stoves, heat pumps, and more. For households, we provide personalized advice and guides, access to a network of trusted 3rd party vendors, and help finding incentives & financing.

We offer a turnkey solution for State Energy Offices to provide residents with ongoing outreach, education, and support all the way through to concrete actions to achieve their climate action goals and reduce emissions from buildings and transportation. What makes our solution unique is the ability to make a personalized, multi-year plan for residential households as well as provide ongoing engagement, check-ins, and 1:1 concierge support. Our solution can be white labeled and customized for your program.

Features include:

- Realtime data and reporting, including total annual emissions reduced by category across households. Customized reports and detailed data are available upon request.
- Integration with existing CRM systems to customize vendors and incentives for your region.
- Household onboarding used to calculate energy use and return on investment, as well as to provide recommendations and target outreach.
- Personalized guides for each upgrade category, including help finding contractors, incentives and rebates, and financing options.
- The ability to “Make a Plan” to help homeowners prioritize projects and enable ongoing communication over time.
- Option to add peer-to-peer support and community ambassador functions so that local residents can volunteer to answer community questions and share their experiences with specific electrification upgrades.
- Personalized estimates for costs, savings, and emissions reductions.
- One-on-one Concierge support to answer questions from residents via chat, phone, or video call.
- Accessible, mobile-friendly web interface.

Submission Requirement and NASEO’s Use of Canopy’s RFI Response

Canopy 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.

Signed,



Michael Mettler
CEO