

Company Characteristics

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Equity, Diversity, Inclusion, and Accessibility (DEIA)

Evergreen is committed to providing a welcoming environment where all team members—regardless of gender, race, color, ethnicity, age, sexual orientation or identity, education, military service, religion, or disability—feel supported, valued, and respected. As a certified B Corporation, we deeply value the importance of having a diverse team that represents the communities we serve. Evergreen has two teams devoted to diversity—internally and externally. Evergreen’s internal Equity, Diversity, and Inclusion (EDI) Committee meets monthly and provides mentoring on diversity approaches in the market and in their communities. In addition, we have three Evergreen Diversity Outreach Coordinators, who support external activities. Their time is exclusively dedicated to diversity in our outreach and programs. 10% of our team identify as racial/ethnic minorities, 7% as veterans, 5% as disabled, and 3% as LGBTQIA. We have a balanced representation of genders across our managers and leadership team. 45% of managers identify as female, 50% of our leadership team identify as female, and 33% identify as LGBTQIA.

Relevant Experience

Evergreen formed and has administered Bonneville Power Administration’s (BPA) integrated Trade Ally Network NW since 2007. This extensive network of trade allies serves BPA’s 140+ distribution utilities across eight states. Evergreen has relationships with the major manufacturers that supply the region with energy efficient equipment, leveraging these relationships to drive product selection and distribution-level decisions for the region. In addition, Evergreen’s field specialists spread across Washington, Oregon, Northern California, Idaho, and Montana meet with local contractors and distributors each day to provide one-on-one support and motivation to align their sales efforts with regional utility offerings. The Evergreen team provides training and technical expertise on relevant and emerging technologies. Since 2020, Evergreen has worked with BPA to build, launch, and implement their residential program portfolio—Comfort Ready Home. Our role is to work directly with residential contractors and distributors to provide them with education, outreach, and assistance to motivate towards energy efficiency in their sales processes. Key focus areas are HPWH, HVAC, and weatherization with dedication to education around proper installation. Additionally, the Comfort Ready Home team launched a HPWH-focused contractor and distributor incentive, the Greener Water Heater Promotion. The promotion helped encourage contractors to begin selling and installing HPWHs who previously had not done so and encouraged contractors who were already installing HPWHs to double down on their efforts. The incentive was administered through online portals and applications processes, making participation for contractors simple. These comprehensive programs can be viewed at <https://www.tradeallynetworknw.com/> and <https://comfortreadyhome.com/>.

Evergreen Services

For over 25 years, Evergreen has supported contractors and motivated customers to participate in residential and commercial energy efficiency programs across the U.S through program design and implementation. We have the expertise, experience, and resources in place to successfully implement these services for SEOs. Our team includes seasoned program managers, former HVAC contractors and distributors, digital marketers, energy auditors, data analysts, and technical experts. As a designated small business and certified B Corporation, Evergreen is focused on our clients, our employees, and the environment, rather than the interests of corporate

shareholders. Our team has proven competencies in heating and cooling programs, electrification initiatives, and homeowner community engagement which has been demonstrated across the U.S. Below are summaries of the key services that we offer to SEOs in the execution of the Home Energy Performance-Based Whole-House Rebate Program (HOMES) and the High-Efficiency Electric Home Rebate Program (HEEHR):

1. *Program Design and Development.* Design the HOMES and HEEHR programs, considering the specific goals and objectives of each SEO. Our expertise will ensure that activities are tailored to maximize energy savings, promote high-efficiency technologies, and align with regulatory requirements.
2. *Regulatory Compliance.* Navigate the regulatory landscape, ensuring that programs meet the necessary criteria, eligibility, and reporting requirements.
3. *Stakeholder Engagement and Outreach.* Develop comprehensive stakeholder engagement plans to foster collaboration among stakeholders, including utilities, contractors, homeowners, and local communities. Our expertise in engagement strategies will ensure effective communication, education, and participation in the programs, leading to increased adoption rates and program success.
4. *Homeowner Engagement.* Leverage strategic partnerships to provide third-party certifications that deliver equity to homeowners and digital engagement platforms that drive homeowner participation and adoption of energy efficient measures. Strategic, thoughtful homeowner engagement will enhance program visibility, increase homeowner satisfaction, and achieve higher participation rates, ultimately maximizing the impact of the HOMES and HEEHR programs.
5. *Contractor Training and Support.* In-person and virtual training to contractors to enhance their knowledge of energy efficient technologies, installation best practices, program guidelines, and reporting requirements. Evergreen offers our exclusive, made for the energy industry, online training platform, EiQ, which provides dynamic and informative courses for contractors, distributors, and any audience a program seeks to reach.
6. *Program Implementation and Management.* Implementation and management of the SEOs programs, such as developing program guidelines, application processes, and rebate structures. Our team will assist in streamlining program administration, tracking project progress, and ensuring accurate and timely rebate disbursements.
7. *Data Analysis and Reporting.* Collect and analyze program data, tracking energy savings, cost-effectiveness, and other key performance metrics. Our team will prepare comprehensive reports that evaluate the impact of the programs, helping the SEOs assess program effectiveness, identify areas for improvement, and make informed decisions for future program iterations.
8. *Continuous Improvement and Evaluation.* Facilitate ongoing evaluation of the HOMES and HEEHR programs, conducting assessments, gathering feedback, and recommending program enhancements. Our focus on continuous improvement will ensure that the programs remain responsive to evolving market needs, technological advancements, and policy changes.

For more information, please contact Carly.Burke@evergreen-efficiency.com. We look forward to discussing your specific needs and developing a tailored approach to help you achieve success. Evergreen 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.



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