ELECTRIC POWER ENGINEERS

EM&V Contractor
RFP 24-09

Proposal Presented to:

Louisiana
Public Service Commission

November 20, 2024

Reference: EM&V Contractor RFP 24-09

Dear Louisiana Public Service Commission:

Thank you for inviting Electric Power Engineers, LLC (EPE) to respond to your EM&V Contractor Request for Proposal. We are excited for the opportunity to collaborate with you and look forward to the opportunity to act as an extension of the Louisiana Public Service Commission (LPSC) team.

With over 50 years in the power and energy industry, EPE has a long history of providing quality consulting services to utilities, cities, project developers, power generators, Independent System Operators, regulators, and financial institutions. EPE is positioned as an electric utility domain expert and has deep experience in the rapidly expanding field of electrification, demand side management, clean energy technologies, distributed energy resources, distribution planning and grid modernization. We can leverage our expert knowledge and direct experience supporting electric utilities to run technology pilots, engineering models, and analytics needed to be successful with their programs and operations. Our team includes 300+ power systems consultants, bringing decades of energy industry experience to your operations and electrification efforts.

Hugo Mena, P.E., will act as the single point of contact during the RFP review process and is duly authorized to contractually bind and sign an agreement on behalf of EPE. Fahad Rashid will be the single point of contact for operational elements, if awarded.

Please do not hesitate to call with any questions that you may have regarding this proposal. We will be glad to work with you and tailor our services to fit your exact needs.

Yours very truly,

Hugo E. Mena, P.E.
Chief Growth Officer
Mobile: 512-771-0297
hmena@epeconsulting.com

Table of Contents

A. OVERALL APPROACH TO THE TRANSITION OF A NEW STATEWIDE EE PROGRAM

A1. DESCRIBE YOUR VISION FOR THE PROGRAM/STRATEGIC EM&V PLAN FOR THE I-YEAR TRANSITION PERIOD AND FOR THE NEXT 4 YEARS OF THE FIRST BUDGET CYCLE.

Vision Statement

Our strategic EM&V plan emphasizes a robust, data-driven framework that not only aligns with Louisiana's Phase II Rules but also prioritizes ease of participation by customers and operational efficiency for utilities. Our approach is designed to establish clear, achievable targets that accurately measure and validate savings without imposing unnecessary burdens on program participants or administrators. During the one-year transition period, our priorities will be developing foundational EM&V structures, conduct market potential studies and baseline studies, identify performance targets, determine the need for a Louisiana specific Technical Resource Manual (TRM) and, if desired develop it, and secure collaboration channels with utilities, the Administrator, and the Louisiana Public Service Commission (LPSC). For the four-year budget cycle, the focus will shift to tracking and evaluating performance against goals, refining the TRM and EM&V Plan as necessary, and supporting program improvement and process refinements through feedback loops, while ensuring cost-effectiveness and compliance with regulatory standards.

Transition Period (2025) Strategic Vision

The transition period's primary objective is to lay a strong EM&V foundation that balances rigor with stakeholder accessibility. Establishing data consistency, baseline accuracy, clear metrics, and transparent operational procedures among stakeholders will be key, as will collaborating with utilities, the Administrator, and Commission staff to set standards that support efficient verification while minimizing administrative burden. Our aim is to implement a centralized tracking system that enables real-time data monitoring and minimizes redundant steps, creating a clear standard for accurate and complete data submissions without unnecessary complexity. This period will involve market potential and baseline studies targeting customer classes and sectors, ensuring data collection is meaningful yet not intrusive, so participants feel valued rather than overwhelmed by requirements.

Preliminary reports and templates created during the transition will be optimized for simplicity and clarity, ensuring methodologies align with Louisiana's Phase II Rules and offer scalability for future cycles. This proactive establishment of templates and verification protocols will smooth evaluation cycles and reduce reporting complexities over time, laying the groundwork for reliable performance assessments that respect participant and program staff time and resources.

Four-Year Budget Cycle Strategic Vision

The primary goals for the first four-year budget cycle will focus on tracking program performance, refining TRM measures, calculations, and methodologies as needed, and implementing ongoing process improvements. By using a feedback-loop approach, each year's findings will be reviewed to streamline future EM&V processes, avoiding over-verification steps that add cost and delay without additional value. This approach allows us to make defensible adjustments in energy savings calculations while keeping the process lean, user-friendly, and cost-effective. We will also provide recommendations for program improvements based on customer feedback and program results.

Our EM&V framework will encompass annual process evaluations, impact assessments, and participant satisfaction surveys. These evaluations will ensure that while cost-effectiveness and program integrity are paramount, customer satisfaction remains a guiding factor. Deliverables will include annual reporting that provides clear and actionable feedback without unnecessary complexity, making the process manageable for all stakeholders. Our ongoing commitment to refining and simplifying processes ensures continued compliance with Louisiana's standards and enhances the impact and effectiveness of the programs.

A2. PLEASE PROVIDE A LIST OF THE KEY PERFORMANCE INDICATORS ("KPIS") THAT YOU WILL USE TO TRACK TO EVALUATE YOUR PERFORMANCE, YOUR PARTNERS' PERFORMANCE, AND SUBCONTRACTORS' PERFORMANCE. PLEASE INCLUDE AT LEAST 2 LEADING KPIS THAT WOULD TRACK PROACTIVE ACTIONS THAT YOU WOULD TAKE AS THE EM&V CONTRACTOR DURING THE TRANSITION AND IMPLEMENTATION PHASES.

To effectively monitor EM&V performance, both leading (proactive) and lagging (outcome oriented) KPIs will be utilized to evaluate program progress, utility engagement, subcontractor compliance, and the overall impact of the EM&V program.

Leading KPIs (Proactive Monitoring):

1. **Baseline Data Completeness:** This KPI will assess the accuracy, thoroughness, and timeliness of baseline data collection from all participating utilities. By tracking data completeness, we ensure that all required data points are captured at the start of the program, providing a foundation for reliable evaluations. This KPI is essential in the transition phase to establish a consistent data standard across utilities and partners, ensuring accurate baseline conditions that will be crucial for measuring actual energy savings. Setting a manageable yet comprehensive baseline ensures that evaluations are accurate from the start, minimizing adjustments that could disrupt program participation or increase costs.
2. **Stakeholder Engagement and Responsiveness:** Effective communication with utilities, the Administrator, and Commission staff is critical to identifying and addressing issues early. This KPI will monitor the frequency and quality of interactions, ensuring all stakeholders are fully informed of EM&V requirements, have ample

opportunities to discuss concerns, and can contribute to program refinements. Metrics for this KPI include meeting frequency and participation rates, where we will track the number of scheduled meetings with each stakeholder group per month or quarter and aim for a minimum participation rate of 90% to reflect active engagement. Additionally, we will monitor stakeholder inquiry response time, targeting an average response of 48 hours to ensure prompt and timely communication. Other metrics include the percentage of action items resolved on time, with a goal to address stakeholder concerns within two weeks, and a periodic stakeholder satisfaction rate, where we will aim for a satisfaction score of 85% or higher to demonstrate effective communication. A collaborative approach in the transition phase will foster trust, encourage data transparency, and enhance the alignment of expectations across all parties.

Lagging KPIs (Outcome Evaluation):

1. **Energy Savings Realization Rate**: This metric compares achieved energy savings to projected targets based on TRM standards, directly measuring program effectiveness. By setting practical targets that balance a prescriptive approach, focused on ease of customer participation and program administration with the complexities of overly burdensome verification, we aim to maximize savings without creating processes that are overly intrusive to customers or taxing on program administrators. This approach will maximize customer engagement and help prevent attrition, ensuring that participation remains accessible and appealing to customers.
2. **Program Cost-Effectiveness**: Using the Total Resource Cost (TRC) test to assess cost-effectiveness ensures that resources are utilized efficiently. This KPI also considers how additional verification steps might impact overall costs. We aim to strike a balance between verifying savings accurately and keeping administrative overhead low, ultimately supporting a program that maximizes participant satisfaction and cost-effectiveness.
3. **Participant Satisfaction Rate**: Tracking participant satisfaction offers insights into program accessibility, customer experience, and impact, helping us identify areas where procedures may need simplification. Participant feedback ensures that program adjustments are driven by participant needs and data-informed decisions, minimizing barriers to participation and enhancing program effectiveness and customer satisfaction.

A3. BASED ON YOUR UNDERSTANDING OF THE PHASE II RULES, PLEASE PROVIDE A LIST OF EM&V DELIVERABLES (REPORTS, STUDIES, PROCESS DOCUMENTATION AND MANUALS) AND CHECKPOINTS (MEETINGS) EXPECTED FOR THE TRANSITION YEAR 2025 AND DURING THE FOUR-YEAR PROGRAM BUDGET CYCLE.

Our EM&V approach includes a series of deliverables and checkpoints designed to ensure timely updates and thorough reporting of program performance.

Transition Year (2025) Deliverables and Checkpoints:

- **Market Potential and Baseline Studies Report**: We will deliver a comprehensive report on baseline conditions, including customer class data, equipment and operational characteristics, and energy consumption patterns. This report will establish benchmarks and help define savings targets that can be assessed against during subsequent evaluations. In addition, we will conduct a market potential study to identify realistic targets tailored to each customer segment, aligned with utility customer demographics. By establishing realistic savings targets at the outset, we can avoid overly rigorous benchmarks that might otherwise require excessive monitoring and complex verification processes. This approach simplifies program management for all stakeholders by creating goals that are straightforward to verify, minimizing customer impact while ensuring that the savings claimed are both achievable and meaningful.
- **EM&V Plan Document**: Outlining core evaluation processes, protocols, and metrics, the EM&V plan will serve as a guide for the four-year cycle. This document will detail data handling protocols designed to facilitate consistent, straightforward reporting, ensuring that utilities and stakeholders have clear, concise standards to follow.
- **Stakeholder Orientation Meetings**: Conducting initial meetings with utilities, the Administrator, Commission staff, and the Louisiana Energy Efficiency Working Group (EEWG) will establish clear roles, expectations, and data-sharing guidelines. This collaboration will create a supportive structure that minimizes misunderstandings, fosters alignment across stakeholders, and reduces participant burden by clarifying reporting procedures from the start. Engaging with the EEWG will also ensure that all parties remain informed on evolving program requirements and best practices, enhancing the efficiency and impact of the EM&V framework.

Four-Year Program Budget Cycle Deliverables and Checkpoints:

- **Annual Evaluation Reports**: These reports will detail energy savings, demand reductions, cost-effectiveness assessments, and any necessary updates to TRM deemed savings values. Each report will include actionable recommendations for ongoing program improvements.
- **Mid-Cycle Verification Process Evaluation**: Assessing program operational efficiency midway through the cycle allows us to make adjustments that enhance program delivery without imposing significant extra effort on participants. By making data-backed improvements, we ensure cost-effectiveness without adding unnecessary administrative burden. Findings will guide adjustments to enhance the program's cost-effectiveness and impact.
- **Final Report and Strategic Recommendations**: This cumulative report will offer insights on program savings, cost-effectiveness, and suggested next steps. Our recommendations will focus on ways to sustain customer engagement, reduce

administrative load, and maintain program integrity, guiding stakeholders toward a model of efficiency that respects participant and program staff needs. This will provide Commission staff and stakeholders with a roadmap for the next phase of Louisiana's energy efficiency journey.

- **Louisiana TRM Development**: If the Commission determines that a Louisiana specific TRM should be developed, create and refine the Louisiana specific Technical Resource Manual (TRM) in collaboration with the EEWG and Commission to ensure it is and remains accurate and is aligned with goals. This process will incorporate industry best practices and state-specific factors to support defensible, efficient claimed savings.
- **Customer Surveys:** Conducting regular surveys will help gauge customer satisfaction, ease of participation, and the perceived benefits of the program. Feedback from these surveys will inform program adjustments, ensuring it remains accessible and appealing to participants.

A4. BASED ON YOUR UNDERSTANDING OF THE PHASE II RULES, WHAT DATA, INFORMATION, AND INTERACTION DO YOU ENVISION NEEDING FROM THE UTILITIES AND FROM COMMISSION STAFF?

Utilities will be required to provide detailed customer data, including baseline consumption and load information, to set reliable benchmarks for tracking savings. By focusing on targeted data, we minimize reporting complexities for utilities, ensuring data submission is efficient without unnecessary steps. Program-specific tracking, including installation records, equipment specs, and realized savings, will be essential for accurate EM&V. Regular status meetings will facilitate ongoing dialogue, enabling adjustments in data submission processes to maintain high accuracy without added complexity.

Feedback from Commission staff will help us adapt the EM&V plan to align with regulatory goals and program benchmarks. Regular check-ins with Commission staff ensure that adjustments are grounded in regulatory needs, keeping EM&V processes streamlined. Staff input will help refine procedures to avoid verification steps that could discourage participation or raise costs, maintaining program accessibility and compliance.

A5. BASED ON YOUR UNDERSTANDING OF THE PHASE II RULES, WHAT DATA, INFORMATION, AND INTERACTION DO YOU ENVISION NEEDING FROM THE ADMINISTRATOR?

The Administrator will play a crucial role in providing ongoing program performance data and insights essential to the EM&V process. Specifically, we will need detailed participation metrics, customer demographic data, and information on customer engagement activities, such as outreach efforts, to evaluate program reach and effectiveness accurately. Access to these data points will help us assess the program's broader impact, identify potential areas for improvement, and ensure that savings are claimed in a manner that reflects the program's true effectiveness.

Additionally, we will rely on the Administrator to share feedback from both customers and utility partners, providing valuable insights into operational challenges, customer satisfaction, and ease of participation. This feedback will allow us to make targeted refinements to the program design and delivery, supporting a balanced approach that maximizes savings while minimizing administrative and customer burden.

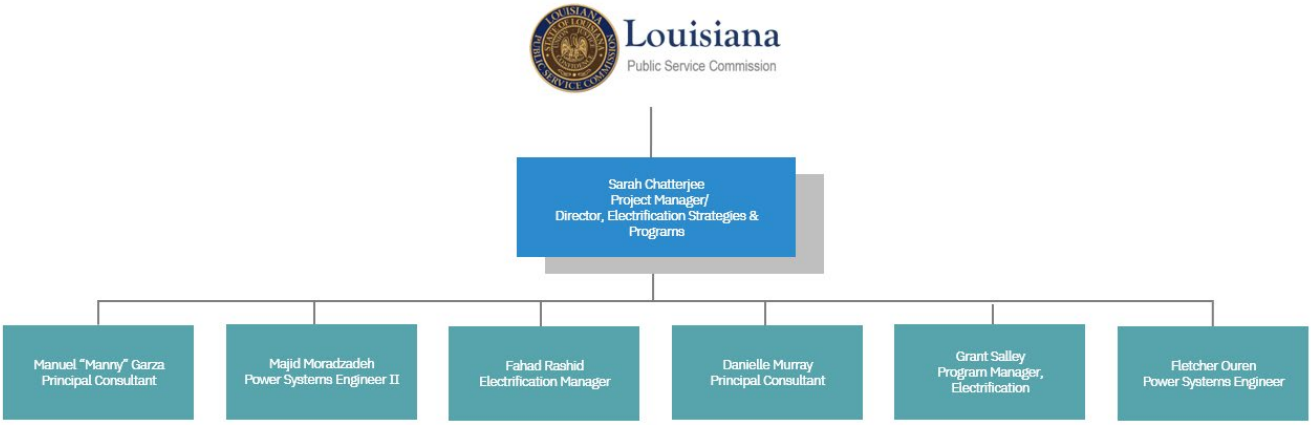
To ensure alignment, we will establish a collaborative communication plan with the Administrator that includes bi-monthly to monthly updates. These updates will provide an opportunity to review EM&V findings, discuss data collection improvements, and make any necessary adjustments to the program. By working closely with the Administrator in this structured, ongoing manner, we can optimize data collection, enhance transparency, and maintain a program evaluation process that is both rigorous and accessible.

A6. INCLUDE THREE (3) REFERENCES FOR YOUR PROPOSED KEY PERSONNEL AND PARTNERS. SUCH PARTNERS AND REFERENCES ARE PREFERRED TO HAVE EXPERIENCE WITH PROJECTS THAT WERE SIMILAR IN THEIR NATURE, SIZE, AND SCOPE OF WORK TO THE WORK DESCRIBED IN THIS RFP. BY LISTING THE REFERENCES, FIRMS AND THEIR PARTNERS GRANT THE STATE AUTHORIZATION TO CONTACT THESE REFERENCES TO ASSESS THE FIRMS' QUALITY OF WORK PERFORMED.

Key Fields	Contact Information
Client	Ameren Illinois
Contact Name	William Reany
Address	300 Liberty Peoria, IL 61602
Phone Number	618-918-0441
Email	wreany@ameren.com
Client	PacifiCorp
Contact Name	James Campbell
Address	825 NE Multnomah, Portland, OR 97232
Phone Number	801-891-8770
Email	James.Campbell@pacificorp.com
Client	Paducah Power Systems
Contact Name	Rick Windhorst
Address	1500 Broadway St, Paducah, KY 42001
Phone Number	720-575-4040
Email	rwindhorst@paducahpower.com

A7. PROVIDE A DETAILED ORGANIZATIONAL CHART WHICH INCLUDES ROLES AND RESPONSIBILITIES FOR PERSONNEL, INCLUDING ANY PARTNERS. HOW WOULD YOUR ORGANIZATIONAL STRUCTURE ADDRESS ACCOUNTABILITY AND RESPONSIBILITY?

The proposed Project Manager for this project is Fahad Rashid, who will serve as the primary point of contact for LPSC. This approach ensures clear and hands-on oversight, ensuring that all processes are followed consistently and accurately. It also helps establish strong stakeholder relationships ensuring all parties remain involved throughout the project life cycle, leading to a successful project execution that meets and exceeds LPSC requirements.



Key Personnel	Role	Task Responsibility
Sarah Chatterjee	Director, Electrification Strategies & Programs	Executive Sponsor
Fahad Rashid	Project Manager/Electrification Manager	Project Manager and Team Oversight
Grant Salley	Program Manager, Electrification	Interim and Final Report Drafting
Majid Moradzadeh	Power Systems Engineer II	EV Network Modelling, Graphic Visualization
Danielle Murray	Principal Consultant	Stakeholder Engagement, Program and Process Assessment
Manuel ("Manny") Garza, P.E	Principal Consultant	Subject Matter Expert
Fletcher Ouren	Power Systems Engineer	Project Management Support

See **Appendix A7 – Resumes**

A8. PROVIDE A DESCRIPTION OF COMPETENCIES THAT DIFFERENTIATE YOU FROM OTHER FIRMS (WHAT ARE YOUR UNIQUE ASSETS)?

The EPE team brings a unique blend of technical expertise, industry-specific experience, and a customer-centered approach that sets us apart in the field of Evaluation, Measurement, and Verification (EM&V) for energy efficiency programs.

A key differentiator is our deep expertise in EM&V processes, including validating savings and conducting comprehensive cost-effectiveness tests at multiple levels—overall utility, market segment, program, and individual measure. This multi-level approach ensures that our evaluations provide a holistic understanding of program impact and cost-effectiveness, enabling precise, actionable insights that support strategic decision-making. Our robust knowledge of EM&V processes allows us to deliver evaluations that are both thorough and aligned with regulatory standards, ensuring savings claims are both defensible and meaningful.

Additionally, we have proven experience in creating a Technical Reference Manual (TRM) for a utility, using calculations and methodologies tailored to that utility's specific program structure. This utility has offered energy efficiency programs for over 30 years, encompassing a large and diverse program portfolio. Our team's work in TRM development leverages this long-standing program history to produce reliable savings estimates, and we have applied TRM standards for both deemed savings and custom calculations, ensuring flexibility and accuracy in savings claims.

Moreover, we have the distinct advantage of experience as customers who have actively participated in energy efficiency programs, giving us a unique, first-hand perspective on the participant experience and the real-world impact of program requirements. This insight allows us to design EM&V processes that are effective in verifying savings while minimizing disruption to participants.

Our approach also prioritizes streamlined, data-driven processes. By leveraging advanced data analytics and targeted baseline studies, we provide precise, actionable insights that enhance program performance without requiring excessive monitoring or complex verification processes. This focus on data transparency and simplification allows utilities and administrators to concentrate on program delivery, rather than on cumbersome data reporting tasks.

Additionally, our customer-centered philosophy ensures that our EM&V methods do not become barriers to participation. We design verification processes that prioritize ease of participation and cost-effectiveness, ensuring programs remain accessible and appealing. Regularly incorporating customer feedback further strengthens our approach, enabling us to adapt methods to meet evolving needs and driving program longevity.

Finally, we bring a collaborative mindset to every project. Our team works closely with utilities, the Administrator, and Commission staff to establish open communication and foster continuous improvement. This proactive, transparent approach ensures that all stakeholders are well-informed and aligned, supporting a coordinated EM&V process that adds real value.

Together, these competencies, TRM expertise, data-driven efficiency, customer-centered design, and collaborative engagement, uniquely position us to deliver EM&V services that not only meet but exceed program expectations.

A9. PROVIDE INFORMATION REGARDING YOUR ABILITY TO MEET STANDARD INSURANCE REQUIREMENTS. THIS INFORMATION MAY BE ATTACHED AS AN APPENDIX AND WOULD NOT COUNT TOWARDS THE 25-PAGE LIMIT.

See **Appendix A9.**

A10. PROVIDE INFORMATION REGARDING YOUR FIRM'S FINANCIAL QUALIFICATIONS, INCLUDING 3 YEARS OF AUDITED FINANCIAL STATEMENTS. THIS INFORMATION MAY BE ATTACHED AS AN APPENDIX AND WOULD NOT COUNT TOWARDS THE 25-PAGE LIMIT.

See **Appendix A10.**

B. DEMONSTRATION OF QUALIFICATIONS

B1. ORGANIZATIONAL SKILLS, FINANCIAL ANALYSIS, AND ABILITY TO TRACK DATA FOR BOTH INDIVIDUAL PROJECTS AND OVERALL PROGRAMS.

The EPE team has a robust background in financial analysis, with extensive experience across various financial modeling and data tracking processes critical to both individual projects and overall program success. Our capabilities encompass cash flow modeling for individual projects and portfolios, program financial calculations for cost-effectiveness, and company valuation models. We bring a comprehensive suite of modeling techniques, including NPV (Net Present Value), ROI (Return on Investment), IRR (Internal Rate of Return), and detailed P&L (Profit and Loss) statements, among many others. This allows us to deliver precise, insightful financial assessments tailored to different levels of program and project complexity.

Our teams experience in performing EM&V on an annual basis for a large vertically integrated utility's demand-side programs has provided us with a robust understanding of the associated costs, benefits, and the critical need for accurate tracking at every level. We recognize that relevant, validated data is as crucial as the financial models themselves to ensure meaningful analysis. This begins at the measure or project level, where data is gathered and validated, and builds through each layer up to the portfolio level, where we compile a comprehensive view of program performance.

EPE's approach includes tracking all associated costs, from individual project expenses to program administration, marketing, and other portfolio costs, ensuring a complete picture of financial health and performance. Our organizational skills in data management ensure that we maintain consistent, structured tracking protocols that support ongoing analysis and program

evaluation. This disciplined approach provides stakeholders with the clarity needed to evaluate program effectiveness, cost-efficiency, and overall impact with confidence.

B2. DEVELOPING ANALYTICS FROM SAID DATA TO ILLUSTRATE THE SUCCESS/FAILURE RATE.

EPE has extensive experience in developing analytics to illustrate program success or failure, applying a structured, multi-level approach to cost-benefit analysis that spans individual measures, programs, and the entire portfolio. At the measure level, we have retired measures that proved non-cost-effective, ensuring that resources are focused on impactful, high-value initiatives. For program-level analysis, we assess the combined effect of individual measures, creating a "portfolio effect" that provides insights into how different measures interact and contribute to program outcomes. At the portfolio level, we aggregate these analyses across sectors, evaluating the overall impact and cost-effectiveness of the entire suite of programs.

Our approach includes tracking key performance indicators (KPIs) and calculating metrics such as program participation, energy savings, customer satisfaction, and cost-effectiveness ratios. These metrics provide a clear, data-driven view of program performance, highlighting successes and identifying areas for improvement. Additionally, our extensive experience with financial models such as ROI, IRR, and comprehensive cost-benefit analysis allows us to pinpoint which elements contribute most to success and which may require adjustment.

We also have experience in producing visualizations and detailed reports that clearly communicate these findings to stakeholders, ensuring transparent understanding of program effectiveness at every level. This data-driven approach, combined with our experience in retiring non-cost-effective measures and refining program mixes, enables us to deliver actionable insights that help stakeholders make informed decisions, optimize resources, and continually improve program performance.

B3. DEVELOPING STANDARD OPERATING PROCEDURES TO SUPPORT THE MANAGEMENT OF THE EM&V ORGANIZATION STRUCTURE.

The EPE team brings robust experience in developing Standard Operating Procedures (SOPs) that ensure streamlined management within the EM&V organization structure. We have created SOPs for both internal operations and client programs, covering critical areas such as data collection, verification protocols, reporting standards, and communication workflows. Each SOP is designed to clearly define processes, roles, and quality control measures, ensuring consistency, compliance, and efficiency across all EM&V activities.

Our approach emphasizes clarity and adaptability; SOPs are crafted to align with regulatory requirements while remaining flexible for updates as best practices evolve or processes change. This ensures that our EM&V organization operates with precision and transparency, supporting reliable outcomes and continual program improvement.

B4. UNDERSTANDING CONFIDENTIALITY RULES/RESTRICTIONS, INCLUDING THE ABILITY TO PROTECT CUSTOMER SPECIFIC INFORMATION AND DATA, AND HAS A HISTORY OF ABIDING BY CONFIDENTIALITY REQUIREMENTS.

EPE is fully committed to confidentiality and data security, underscored by our SOC 2 compliance and our proactive approach to self-monitoring, which ensures we meet data security requirements at all times. With extensive experience working alongside utilities, we prioritize safeguarding customer-specific data, Personally Identifiable Information (PII), and other confidential information essential to program integrity. Our practices include strict access controls, data encryption, and rigorous internal protocols designed to meet or exceed industry standards, ensuring that all customer data remains secure and protected. This commitment to confidentiality, reinforced by continuous self-monitoring, demonstrates our dedication to upholding the highest standards of data protection.

B5. FAMILIARITY WITH CONDUCTING QUALITY ASSURANCE ("QA")/ QUALITY CONTROL ("QC") REVIEWS OF EE PROJECTS.

The EPE team has broad experience in managing QA/QC processes for energy efficiency projects across all market sectors, including developing QA/QC procedures and defining specific field validation criteria. By designing the QA/QC process, it ensured that inspections capture essential information to maintain high data quality and produce actionable data for verifying program measures. Overseeing QA/QC contractors allowed the use of data to validate program administrators' information and provide corrective feedback as needed. This comprehensive approach ensured program integrity, alignment with project outcomes and objectives. This spanned all market sectors.

B6. EXPERIENCE SURVEYING CUSTOMERS AND MAKING RECOMMENDATIONS FOR PROGRAM IMPROVEMENTS.

EPE has significant experience in surveying customers to gather insights on program effectiveness, ease of participation, and overall satisfaction. We also utilize program metrics as an indirect feedback loop to understand what customers experiences and needs, even when they aren't telling you directly. With our background in designing and administering programs, we bring a deep understanding of process improvement and a strong focus on the customer experience. We design and implement surveys that capture essential feedback across customer segments, recognizing that customers are busy and aiming to minimize survey complexity while maximizing insight.

This customer-centered approach allows us to analyze feedback to identify trends or areas for improvement, enabling us to make practical recommendations that enhance program delivery and engagement. Our dual perspective, as program administrators and as customers, ensures that our recommendations are both effective and considerate of the customer's time and needs. This approach supports sustained participation, improves satisfaction, and helps program administrators achieve their objectives with a customer-focused mindset.

B7. EXPERIENCE DRAFTING, OR ASSISTING IN THE DRAFTING, OF A TRM, OR SIMILAR DOCUMENT.

The team has deep-rooted experience in creating "TRM"-type reference documents that ensure savings calculations and methodologies are rigorously documented and defensible. Since as early as 2008, prior to the development of most formal TRMs, we engineered savings calculations that formed the basis of claimed savings and established internal references to ensure consistency and accuracy in documentation.

Over the years, we have also developed TRM-type documents that combine standard TRM measures with additional, utility-specific measures, and adapted calculations based on real-world experiences. This work includes documenting processes thoroughly and providing clear references to the methodologies used, which ensures that claimed savings are both reliable and defensible. Our experience in composing these references has allowed us to produce robust, tailored TRM-type documents that meet the unique needs of various programs while upholding industry standards.

B8. EXPERIENCE PARTICIPATING IN EE WORKING GROUPS.

The EPE team has extensive experience participating in a variety of working groups, including energy efficiency (EE) working groups, commission-led EE working groups, ordinance task forces, generation planning groups, solar working groups, and ERCOT EE working groups. Through these collaborations, we have contributed to setting ambitious goals, creating equity-focused programs, and advancing policies that benefit ratepayers. These working groups have been instrumental in establishing ordinances, protocols, and frameworks that drive additional energy savings and outcomes across multiple sectors. Our role in these groups reflects our commitment to supporting effective, inclusive EE initiatives and contributing to impactful policy and program advancements.

B9. EXPERIENCE PRODUCING, REVIEWING, AND UTILIZING EM&V PLANS.

As a team EPE has experience in producing, reviewing, and utilizing Evaluation, Measurement, and Verification (EM&V) plans to support effective energy efficiency program management. We have developed EM&V plans tailored to specific program goals and regulatory requirements, ensuring each plan captures the appropriate data, metrics, and methodologies to accurately measure program performance. Emphasizing clarity and precision, outlining processes for data collection, baseline establishment, savings verification, and cost-effectiveness assessment.

In addition to producing EM&V plans, we have a strong background in reviewing and refining existing plans, identifying areas for improvement to enhance data accuracy, streamline verification processes, and reduce administrative burden. We also have significant experience utilizing these plans in real-world applications, where we rigorously follow EM&V protocols to assess program effectiveness, track performance against goals, and provide actionable insights for program improvements.

Our experience across EM&V plan development, review, and practical application allows us to implement plans that are both robust and adaptable, supporting continuous improvement and informed decision-making for program administrators and stakeholders.

B10. EXPERIENCE PERFORMING EM&V FUNCTIONS, VERIFYING SAVINGS, COSTS, AND COST-EFFECTIVENESS, AS WELL AS PRODUCING ANNUAL REPORTS.

With a strong foundation in EM&V functions, the EPE team brings expertise in verifying program savings, costs, and cost-effectiveness across diverse program types and sectors. We have rigorously validated both energy and demand savings, applying proven methodologies to ensure all claimed savings are accurate and defensible. Our approach to evaluating cost-effectiveness leverages established metrics, including the Total Resource Cost (TRC) and Participant Cost Test (PCT), allowing us to assess value at the measure, program, and portfolio levels.

Beyond verification, we have a track record of producing thorough, data-driven annual reports that consolidate program performance insights. These reports detail verified savings, cost-effectiveness outcomes, and recommended program improvements. By presenting findings with clear, concise visuals, we provide stakeholders with actionable insights that support transparency and strategic program adjustments.

Our combined experience in performing EM&V functions, cost and savings verification, and report production ensures accountability, program optimization, and continuous improvement.

B11. EXPERIENCE DEVELOPING MARKET POTENTIAL STUDIES AND EVALUATIONS OF FEASIBLE AND ECONOMICALLY OPTIMAL LEVELS OF ENERGY EFFICIENCY.

Conducting market potential studies and evaluating the optimal levels, both technically and economically, of energy efficiency requires both technical expertise and strategic insight, qualities the EPE team consistently brings to each project. By analyzing technical, economic, and achievable potential across market sectors, we uncover where energy efficiency initiatives can deliver the greatest impact. We consider customer demographics, technology trends, and cost-effectiveness limits, allowing us to recommend energy efficiency measures that align with program goals while maximizing value.

These studies go beyond feasibility; they provide a clear picture of economic impacts, helping stakeholders balance program benefits with cost-effectiveness. This approach enables informed decision-making on program scaling and resource distribution, ensuring that energy efficiency portfolios are both impactful and sustainable over the long term.

C. APPROACH TO EM&V FUNCTIONS

C1. **DATA SYSTEMS**: EXPLAIN HOW THE EM&V CONTRACTOR WILL UTILIZE THE DATA SYSTEMS DEVELOPED BY THE ADMINISTRATOR. ALSO, EXPLAIN IF ANY OTHER SOFTWARE WILL BE USED BY THE EM&V CONTRACTOR AND HOW THE SOFTWARE WOULD BE TRANSITIONED, IF NECESSARY, TO A SUCCESSOR EM&V CONTRACTOR AT THE CONCLUSION OF THE CONTRACT PERIOD. BE SURE TO DIFFERENTIATE BETWEEN THE PROGRAMS DEVELOPED FOR AND OWNED BY

THE COMMISSION AND THOSE THAT ARE PROPRIETARY TO YOUR COMPANY. SPECIFICALLY EXPLAIN WHAT PROGRAMS WILL BE AVAILABLE TO THE COMMISSION AT THE CONCLUSION OF THE CONTRACT PERIOD THAT CAN BE USED BY THE COMMISSION FOR ONGOING MONITORING PURPOSES.

EPE will leverage the data system developed by the Administrator as the primary repository for all program-specific information. This system is assumed to capture comprehensive measure-level data, including model numbers, quantities, pre- and post-measurement details, validation photos, specification sheets, and other supporting documentation. By using this centralized system, we ensure that all measure details are readily accessible and can be cross-referenced with QA/QC validations and other program administration inputs, feeding seamlessly into the EM&V plan and analysis.

For cost-benefit analysis, we will use a dedicated Cost-Benefit Analysis (CBA) tool to assess each program's cost-effectiveness accurately. Additionally, data will be housed in a data warehouse maintained by our team to ensure that all analysis results are reproducible, and granular details are retained for in-depth review or future reference.

Any software or tools developed specifically for the Commission—such as templates for data tracking or reporting—will be transitioned to the Commission or a successor EM&V contractor at the contract's conclusion. Proprietary tools unique to our company will not be included; however, any data, reports, or CBA results derived from Commission programs will be made available to ensure the Commission has all materials needed for ongoing monitoring. This approach supports both continuity and transparency, enabling the Commission to maintain effective oversight beyond the contract period.

C2. **DATA SYSTEM MANAGEMENT**: ASSUMING THE EM&V CONTRACTOR DEVELOPS SOFTWARE FOR PURPOSES OF THE LPSC COMMISSION'S STATEWIDE EM&V PROGRAM, DESCRIBE YOUR EXPERIENCE IN DEVELOPING AND MAINTAINING SOFTWARE. AS PART OF THIS, DESCRIBE HOW YOUR FIRM WILL MANAGE AND MAINTAIN CONFIDENTIALITY AND SECURITY OF THE SOFTWARE SYSTEMS.

EPE has a strong background in developing and maintaining custom software solution with its wholly owned software company ENER-i that will support the energy efficiency programs, including applications for data tracking, reporting, and analysis. Our unique understanding, having a software company and our software development experience which focuses on creating user-friendly, robust systems that integrate seamlessly with program data requirements and align with regulatory standards for accuracy and transparency.

For the LPSC Commission’s statewide EM&V program, we would design any necessary software to capture essential EM&V data, perform analyses, and support ongoing program reporting. Our development process prioritizes reliability, ease of use, and scalability to ensure that the software effectively meets the program’s needs across its lifecycle.

Confidentiality and data security are paramount to our software management practices. We are SOC 2 compliant and adhere to strict data security protocols, including role-based access

controls, encryption for data at rest and in transit, and regular system audits. Our team continuously monitors for compliance, implementing safeguards that prevent unauthorized access and protect Personally Identifiable Information (PII) and other sensitive data.

If software is developed for this project, it will be designed to follow industry best practices for cybersecurity, and we will maintain secure backup and disaster recovery processes to ensure data integrity. At the end of the contract period, we will facilitate a secure transition of all software and data to the LPSC or a successor contractor, ensuring that confidentiality and security standards are upheld throughout the transfer process.

C3. **EM&V PLAN SAMPLES**: EXPLAIN YOUR APPROACH AND EXPERIENCE IN DEVELOPING EM&V PLANS. PROVIDE AT LEAST TWO SAMPLES OF PLAN DOCUMENTATION PRODUCED IN PREVIOUS WORK WITH PROGRAMS AND ESPECIALLY IN MULTI-UTILITY JURISDICTIONS. THESE SAMPLES MAY BE ATTACHED AS AN APPENDIX AND WILL NOT COUNT TOWARDS THE 25 PAGE LIMIT.

EPE's approach to developing EM&V plans is grounded in our experience administering programs while aligning program objectives with regulatory standards to create clear, actionable evaluation frameworks. This begins by defining key performance indicators (KPIs) and setting up methodologies that will accurately measure program impacts, such as energy savings, cost-effectiveness, and customer satisfaction. Ensuring the EM&V plans are structured to include baseline measurements, data collection processes, verification methods, and reporting protocols to ensure consistency and transparency.

With our experience in EM&V, we've developed customized plans and approaches across diverse program types and market segments, tailoring each to the specific requirements of utilities, regulatory bodies, and stakeholders. Our plans incorporate both quantitative and qualitative methods to ensure that evaluations capture a comprehensive view of program performance.

Additionally, we build flexibility into each plan to allow for adjustments based on program data and stakeholder feedback, ensuring the plan remains relevant and responsive throughout its lifecycle. This approach enables us to produce EM&V plans that are thorough, adaptable, and designed to provide insights that drive program improvement.

C4. **ANNUAL REPORTING SAMPLES**: EXPLAIN YOUR APPROACH FOR DEVELOPING ANNUAL REPORTING. PROVIDE AT LEAST TWO SAMPLES OF REPORTING PRODUCED IN PREVIOUS WORK WITH PROGRAMS AND JURISDICTIONS. PREFERRED EXAMPLES WOULD DEMONSTRATE EXPERIENCE WITH 1) EVALUATION OF ENERGY EFFICIENCY PROGRAMS WITH MULTIPLE UTILITY JURISDICTIONS AND 2) SAVINGS REPORTING OF ENERGY EFFICIENCY PROGRAMS. THESE SAMPLES MAY BE ATTACHED AS AN APPENDIX AND WILL NOT COUNT TOWARDS THE 25 PAGE LIMIT.

Annual reporting should focus on delivering clear, data-driven insights that align with regulatory standards and program goals. We structure each report to include key metrics such as verified savings, cost-effectiveness, and participation levels. Data is presented with visual aids like charts and tables for easy interpretation, highlighting trends and program impacts.

The report process includes a thorough review for accuracy and clarity, ensuring each report provides actionable insights for stakeholders. We also incorporate feedback from previous reports to improve relevance and clarity each year, aiming to support informed decision-making and continuous program improvement.

C5. **MARKET POTENTIAL STUDY/MARKET RESEARCH**: PLEASE DESCRIBE YOUR APPROACH AND CAPABILITIES TO DEVELOP MARKET POTENTIAL STUDIES. EXPLAIN WHAT DATA IS REQUIRED AND EXPERIENCE CONDUCTING STUDIES, PARTICULARLY ON BEHALF OF MULTIPLE UTILITY JURISDICTIONS HAVING MULTIPLE GEOGRAPHIES AND DEMOGRAPHICS. PROVIDE AT LEAST TWO SAMPLES OF STUDIES PREVIOUSLY PRODUCED. THESE SAMPLES MAY BE ATTACHED AS AN APPENDIX AND WILL NOT COUNT TOWARDS THE 25 PAGE LIMIT.

Combining data-driven analysis with industry insights tailored to varied utility jurisdictions, geographies, and demographics, our approach to developing market potential studies provides a comprehensive assessment of technical, economic, and achievable potential. This ensures that our studies reflect realistic opportunities for energy efficiency across regions and customer segments.

Key data requirements include baseline energy usage, demographic profiles, customer segmentation, and measure-specific performance data. We also analyze technology adoption rates, program participation, and regional cost-effectiveness benchmarks to identify high-impact efficiency measures suited to each jurisdiction.

Our team brings valuable experience from conducting market potential studies as program administrators. In leading various programs, the EPE team has conducted internal studies to understand program impacts on overall portfolio savings, budget, and program administration. Additionally, we have experience working with city commissions to set Demand Side goals, where we assessed potential across all programs and sectors. This combination of hands-on experience and strategic analysis allows us to deliver insights that inform tailored program strategies, optimize resource allocation, and support long-term energy efficiency planning across diverse markets.

C6. **MEASURE MANAGEMENT**: PLEASE DESCRIBE YOUR EXPERIENCE COORDINATING WITH ADMINISTRATORS AND OTHER CONSULTANTS ON MEASURE MANAGEMENT ACTIVITIES. ALSO, DESCRIBE YOUR EXPERIENCE IN MANAGING TRM DEVELOPMENT PROJECTS IN PRIOR ACTIVITIES.

The EPE team has robust experience coordinating across multiple stakeholders in collaborative ways. From program administrators and other consultants in situations where we rely on

measure management activities from others to complete our work. We have a proven track record of working closely with others such as administrators to ensure that measure data is accurately documented, updated, and aligned with program objectives. This collaboration includes defining measure specifications, establishing tracking protocols, and implementing quality assurance processes to maintain consistency and accuracy across all program measures.

In addition, we have successfully led "TRM" type document development, where we oversaw the creation and maintenance of Technical Reference Manual that was used internally prior to the development of current TRMs. We have also created utility specific adaptations to TRMs to tailor the savings and approach to the region in question. Our experience includes creating new measures, updating savings algorithms, and adapting TRM methodologies based on program data and real-world findings. This work involved collaboration with stakeholders to ensure that each measure accurately reflected current technologies, regulatory requirements, and program goals.

By combining rigorous project management with technical expertise, we ensure that measure management and developing a TRM would be efficient, accurate, and aligned with industry best practices.

C7. **STAKEHOLDER COORDINATION**: THE EM&V CONTRACTOR WILL NEED TO COMMUNICATE AND COLLABORATE WITH MULTIPLE PARTIES RELATED TO THE EE PROGRAM. PLEASE DESCRIBE YOUR EXPERIENCE COORDINATING WITH UTILITIES, ADMINISTRATORS, TRADE ALLIES AND WORKING GROUPS TO SUPPORT THE OVERALL GOALS OF THE PROGRAM.

EPE has deep experience working with and across various stakeholder groups, and leading stakeholder engagement processes, including the following examples from the last year: EPE led the Main Public Utility Commission's Integrated Grid Planning Stakeholder Engagement proceeding, engaging non-traditional participants along with technical, industry, and utility stakeholders, working to develop shared priorities for the state's forthcoming integrated grid planning processes. EPE conducted in depth stakeholder engagement and community outreach to support development of the Paducah Power System's EV Readiness Plan, engaging community and business leaders, the auto industry, workforce development and trade organizations, transit and city agencies, state agencies, environmental advocates, and utility stakeholders to identify the community's needs and priorities as they prepared for coming growth in electric vehicles. EPE manages community and stakeholder engagement for PacifiCorp on efficiency and electrification projects such as Connected Communities, conducting outreach and surveys to low-income participants, multifamily and commercial property owners to understand program effectiveness, and coordinating trade allies, technical providers, and research organizations to meet program goals.

C8. **LOCAL STAFFING**: PLEASE DESCRIBE YOUR ABILITY AND EXPERIENCE TO STAFF A LOCAL OFFICE TO SUPPORT EFFECTIVE COMMUNICATION AND COLLABORATION WITH THE LPSC, ADMINISTRATOR, AND EEWG, AND TO SUPPORT THE OVERALL GOALS OF THE PROGRAM.

EPE is committed to providing localized support to ensure effective communication and collaboration with the LPSC, the Administrator, and the EEWG. EPE understands the importance of a strong local presence and collaboration, and we are prepared to mobilize the team onsite as needed to support the overall goals of the program.

To facilitate this, EPE will designate a primary point of contact who will be fully responsible for day-to-day communication and coordination with the LPSC, Administrator, and EEWG. This dedicated individual, supported by key personnel, will ensure that any questions, concerns, or program needs are addressed promptly and effectively. EPE team will be readily available for regular meetings, updates, and program milestones, both in person and remotely, to provide ongoing support.

In addition, EPE will implement Key Performance Indicators (KPIs) to measure the success of our communication and collaboration efforts. These KPIs will allow us to maintain high standards of service and ensure transparency with all stakeholders involved.

D. COST PROPOSAL

D1. PROVIDE THE PROPOSED BUDGET IN THE REQUIRED FORMAT PROVIDED IN ATTACHMENT B AS WELL AS AN HOURLY RATE SCHEDULE FOR MANAGEMENT PERSONNEL AND EXPECTED FUNCTIONAL ROLES. THE PROPOSED BUDGET SHALL BE SUBMITTED AS A TOTAL, NOT-TO-EXCEED BUDGET. ATTACHMENT B PROVIDES A BREAKDOWN OF THE COST PROPOSAL INTO 6 COST CATEGORIES. IT IS KEY THAT FIRMS PROVIDE A COMPLETE DESCRIPTION OF THE LEVEL OF SERVICE CORRESPONDING TO THE BID PRICE FOR EACH CATEGORY. FIRMS SHOULD INCLUDE A NARRATIVE DESCRIPTION AND KEY METRICS FOR EACH CATEGORY TO ACCOMPANY THE BUDGET TEMPLATE RESPONSE.

See **Appendix D1.**

D2. DESCRIBE HOW YOUR EM&V CONTRACTOR BUDGET ACCOUNTS FOR UNCERTAINTY? FOR EXAMPLE, THE EM&V CONTRACTOR MAY BE REQUIRED TO PERFORM STUDIES THAT HAVE NOT BEEN SPECIFICALLY IDENTIFIED IN THIS RFP. PLEASE EXPLAIN WHAT BUDGETING ALLOWANCE THE FIRM HAS INCLUDED TO ACCOUNT FOR THIS POSSIBILITY. COSTS FOR THIS ITEM SHOULD BE INCLUDED IN ATTACHMENT B UNDER THE TASK "OTHER ANALYSIS, STUDIES, AND COMMISSION SUPPORT."

There is some cushion allowed in the other analysis and commission support. The allocation is meant to handle any ad-hoc requests or the need to expand the scope a bit if necessary. In the effort to not over account we have provided a reasonable value, and it is not intended to cover significant increases in scope not foreseen within the current scope of work.

D3. PROVIDE A SAMPLE CONTRACT, OR PREFERRED TERMS, FOR USE IN THE DEVELOPMENT OF THE FINAL CONTRACT. REGARDLESS OF WHETHER A SAMPLE CONTRACT OR PREFERRED TERMS ARE PROVIDED, INDICATE WHICH TERMS YOUR FIRM CONSIDERS TO BE NON-NEGOTIABLE.

See **Appendix D3**

E. CONFLICT OF INTEREST DISCLOSURE

EPE is committed to full transparency regarding any potential conflicts of interest as requested by LPSC. Below, we outline current and prior engagements relevant to this disclosure and the measures we will implement to avoid any potential conflicts.

We are currently engaged with Jefferson Davis Electric Cooperative on the following scopes.

- FERC Seven-Factor Test
- Expert Witness Testimony Support
- Base Case and Contingency File Development
- Steady State Analysis
- Sensitivity Analysis – Phase I
- Sensitivity Analysis – Phase II
- Testimony and Filing Support (Reliability Analysis)
- Participation and testimony at LPSC Meetings
- Economic Benefits Analysis
- Testimony and Filing Support

Separation of Personnel and Roles

To ensure complete impartiality and avoid any conflict of interest the individuals assigned to the Jefferson Davis Electric Coop. scopes will not participate in any capacity on the EM&V contractor role under this RFP. A separate and dedicated team will be assigned to the LPSC project, ensuring no overlap in personnel or responsibilities.

Data Access and Security Controls

At EPE, we prioritize the protection of sensitive data through robust security practices. Our data access controls ensure that employees and contractors receive only the minimum access necessary to perform their duties. We implement Role-Based Access Control (RBAC) to assign permissions based on job functions, with group-based rights applied whenever possible to maintain consistency. Multi-Factor Authentication (MFA) is required for all privileged access to production systems, further securing critical data. To ensure strict separation of roles, we utilize firewall policies to segment internal networks and control data exchange, preventing cross-access between unrelated projects. Regular audits are conducted to verify compliance with our information security policies and uphold industry standards, safeguarding project data at every level.

F. APPENDICES

- A7 Resumes
- A9 Insurance Qualifications
- A10 Financial Qualifications
- C2 Sample EM&V Plan Documentation
- C3 Sample Annual Reporting
- C4 Sample Market Potential Study
- D1 Cost Proposal (Attachment B)
- D3 Sample Contract(s)
- Statement of Qualifications