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April 3, 2024

Kimberly N. O'Brian
Kathryn H. Bowman
Louisiana Public Service Commission
602 N Fifth Street (Galvez Building)
P.O. Box 91154
Baton Rouge, LA 70821-9154

Subject: Request for Qualifications of Program Administrator

Dear Ms. O'Brian and Ms. Bowman,

APTIM Environmental & Infrastructure, LLC (APTIM) appreciates the opportunity to present our qualifications to serve as Program Administrator to design and implement a statewide energy efficiency program for the state of Louisiana. APTIM has been successfully serving as Third Party Administrator (TPA) for utilities in Louisiana since 2017 and serving as TPA for Entergy Louisiana's (ELL) energy efficiency programs since 2018. APTIM is exceedingly proud of our performance as a TPA. We have helped ELL exceed portfolio savings goals each year since assuming our role, while ending under budget annually. In 2022, the last year in which third party evaluation data is available, savings reached 121% of our combined goal across the two ELL territories and we expect 2023 to show a sixth straight year of exceeding savings goals, once the evaluation is complete later this year.

Our strong performance in Louisiana mirrors the level of success we have seen in our role as Program Administrator for Focus on Energy, the statewide energy efficiency and renewable energy program in Wisconsin, where we have served as TPA since 2011. This program covers over 100 utilities and delivered energy efficiency services to nearly 1,000,000 residential and 3,900 business customers in 2022 alone. Since being selected as Program Administrator for Focus on Energy in 2011, APTIM has assisted with three quad plans, totaling more than \$1.1 billion in rate payer funds, 5.6 billion kWh, and 208 million therms in net energy savings. Focus on Energy also has won 68 industry awards for its impact and innovative ways of reaching underserved households, and was deemed the most cost-effective program in the country by Lawrence Berkeley National Laboratory, as announced in [WisBusiness News](#).

As a Louisiana-based company, with nine offices and more than 327 employees in the state, we are keenly aware of the importance of ensuring the economic benefits of these programs flow to



local and diverse businesses. Last year, more than 33% of our budget as TPA for both Entergy Louisiana and Entergy New Orleans went to local and diverse contractors, with 18% of Energy Smart projects undertaken by trade allies with diverse supplier certifications. A prime example of our focus on growing the local workforce comes from our partner, Legacy Professional Services, which has grown its workforce from under five to more than 14 Louisiana-based employees, since 2020, thanks to APTIM's efforts. With the strong staff already present in Louisiana, our plan is to deploy this talented team for this work.

Given APTIM's experience in both administering and implementing utility-led energy efficiency programs, including for both Entergy Louisiana and Entergy New Orleans, APTIM intends to explore whether the best option for the Louisiana Public Service Commission and Louisiana rate payers is for APTIM to only administer this program, as done in Wisconsin, or for APTIM to also implement some programs, as done for the Entergy programs. This evaluation will depend upon the specifics of the RFP and the program goals, budgets, and designs developed in the coming months.

Once again, we appreciate the opportunity to present our qualifications and look forward to further discussions about this important role.

Sincerely,

APTIM Environmental & Infrastructure, LLC

A handwritten signature in black ink, appearing to read 'Greg Coffman', written in a cursive style.

Greg Coffman
Senior Vice President

Response to RFQ

1. *The point of contact/liaison for:*

APTIM's Point of Contact for this procurement is Dan Reese. Dan can be reached at Daniel.Reese@APTIM.com or 415 971 5063.

Below are responses to the specific items identified in the RFQ:

- a. **Public Utility Commissions and Staff**—Since 2011, in its capacity as Program Administrator for Focus on Energy, APTIM regularly interacts with the Wisconsin Public Service Commission (PSC) staff regarding day-to-day administration items as well as engaging in long-term program planning efforts. APTIM provides critical support to the PSC staff, who report to state Commissioners, such as drafting memoranda in support of various initiatives or preparing reports for presentation to state commissioners about Focus on Energy's progress, challenges, and APTIM's deliverable achievements. We also assist with the Quad planning for the coming four-year program cycle.
- b. **State or federal agencies**—As Program Administrator for Focus on Energy, APTIM coordinates with the Public Service Commission and State's Office of Energy Innovation (Wisconsin's State Energy Office) on a number of pilots and programs. For instance, APTIM has been working closely with both agencies on developing the pre-administration funding and full application of the Home Energy Rebate Programs funded by the Inflation Reduction Act, as well as assisting with the planning and application development of the state's *Solar for All Grant* submittal. But APTIM's role in assisting state agencies with energy efficiency funding extends back even further as contractor to Louisiana and Missouri in supporting grant administration of Energy Efficiency Conservation Block Grants and State Energy Funds provided by the American Recovery and Reinvestment Act (ARRA) beginning in 2009 and continuing through 2012.
- c. **Energy efficiency contractors and/or evaluators**—As a large administrator and implementer of energy efficiency programs for over 20 years, APTIM has worked with thousands of energy efficiency contractors (trade allies), dozens of implementation contractors, and nearly every major third-party evaluator, including ADM Associates, Cadmus, and Guidehouse.
- d. **Public Utilities**—As Program Administrator for Focus on Energy, APTIM's dedicated Utility Engagement team liaises with 107 Wisconsin utilities—comprised of IOUs, Munis and Coops—participating in Focus on Energy. The team identifies and provides resources to help utilities effectively engage with their customers on energy saving opportunities. In addition, the team leads initiatives that allow utilities to leverage the Program to enhance and expand upon the utilities' own services and programs. Through more than 10 years of

experience, APTIM has developed a strong expertise in understanding how to engage and effectively coordinate with utilities of all sizes and complexity.

- e. **End-use Customers**—APTIM has experience providing services to end-use customers as Administrator for multiple, large, and sophisticated energy efficiency programs, covering all customer segments. In 2022, as Wisconsin’s Focus on Energy Program Administrator, APTIM provided services to nearly 1 million residential customers and 3,900 business customers, of which more than 37% were in rural ZIP codes. This percentage is slightly higher than the percentage of people living in Wisconsin rural ZIP codes, reflecting more participation from rural customers. APTIM has deep expertise in understanding the needs of these different types of customers—from residential, to commercial, industrial, institutional, agricultural, and governmental. APTIM has developed novel and award-winning marketing programs to reach, recruit, and support these different customer types.
- f. **Energy Efficiency Working Groups**—As TPA for Entergy New Orleans, APTIM has actively worked to obtain and integrate stakeholder feedback into Energy Smart programming since 2017. For all offerings, APTIM facilitates feedback sessions involving the utility (ENO), members of our Trade Ally Advisory Group (TAAG), and other stakeholders to identify and evaluate innovative options for program enhancement throughout the program year. APTIM manages the formal feedback process for program trade ally contractors with the Trade Ally Advisory Group (TAAG), improving contractor participation and training. With Focus on Energy, APTIM manages numerous energy efficiency working groups, from trade associations, the utility governing board, and the 107 utilities that Focus serves.

2. Organizational, financial, and data tracking abilities for both individual projects and overall programs.

APTIM has extensive experience tracking organizational, financial and measure-level data for both individual projects and for overall programs. Our experience includes closely collaborating with the Public Service Commission of Wisconsin on its database used for tracking the Focus on Energy programs since 2011. APTIM is responsible for using this system to track customer data, trade ally information, measures deployed, savings, program performance and for all payments, whether for an incentive on a project or for implementation cost from implementers, and for APTIM’s administrative fees. The system is also used to track all program budgets and spending, program performance, and for monitoring and managing implementer compliance with program rules, such as eligible expenses. Data housed in the database is the basis for information used by third-party evaluators, compliance agents, and financial auditors.

In addition, APTIM has developed and maintains its own proprietary software system, APTracks that for seven years has been used for programs we administer for Entergy New Orleans and Entergy Louisiana, as well as numerous other programs, such as for the City and County of Denver’s *Home Energy Rebate* program. This system, likewise, tracks customer level data, trade ally information, installed measures and savings, as well as budgets and spending.

APTracks also has capabilities to allow importing of utility level data, as is done for Entergy's programs and for stacking and braiding of incentives, as is done for the City and County of Denver, given funding available from the local utility for some items.

3. *The use of data to monitor and track successful energy efficiency programs, and the ability to develop analytics from said data to illustrate the success/failure rate.*

A key element of any energy efficiency program is using data to track performance and to ensure programs will meet goals, whether related to savings targets, social equity, and reaching underserved markets. Central to APTIM's administration and implementation strategies is reliance on data to ensure success and offer early warnings about needed course corrections. APTIM has developed numerous dashboards to track progress towards goals and to highlight programs that may be lagging. One case in point was the manufactured housing program offered by Entergy Louisiana, which was below expected levels mid-year. APTIM used analytics to identify areas where additional marketing and focus could provide program lift, which allowed the program to correct course and end the year above its savings goal. In addition to using data to track savings goals and budgets, APTIM uses the data to better understand how best to reach customers, particularly, underserved ones, and to understand where measures, and coupling of measures, may be most effective.

Another good example of APTIM's use of data comes from our role as implementer of the *Community Energy Savers* program for AEP Ohio from 2014 to 2020. This program was designed to provide program lift to AEP Ohio's energy efficiency programs by working with local communities to promote greater adoption of AEP's and Columbia Gas' energy efficiency programs. Communities exceeding their participation goals received funding for an energy efficiency project selected by the community. To track success, APTIM had to develop several qualitative and quantitative measures and collect data from a variety of sources. The primary challenge was that energy savings was a lagging indicator for participation and was a function of other critical front-end components, such as marketing efforts by the community, resident participation at local events, and engagement by key team members, such as political leaders and community-based organizations. Consequently, APTIM developed specific data points for these key variables to better understand early on if a community was not going to hit the target. Thanks to our ability to develop novel data points, to continuously innovate, effectively track and analyze data, ***all participating communities exceeded their participation goals, in some cases by more than 200%.***

4. *Development of a standard operating procedure to support managing an organizational structure with clearly defined roles and responsibilities, within various areas, including how those coordinate and work towards the same goals.*

A key to managing large, sophisticated statewide energy efficiency programs is developing standard operating procedures, clear organizational structures, and a common set of goals. ***Having successfully managed more than \$1.5 billion in energy efficiency funding over***

the past two decades, supported millions of energy efficiency projects, and achieved tens of billions of BTUs in net energy savings, APTIM has a proven track record in effectively managing the complexity that comes with these energy efficiency programs.

For instance, Focus on Energy has developed a strong set of operational policies and procedures to increase efficiency and effectiveness and to ensure appropriate structures and alignment. APTIM manages all program policies and procedures that impact not only the Administrator and Implementers, but also the other Focus stakeholders—the Evaluator, Fiscal Agent, Systems Administrator, and the Compliance Agent.

APTIM also has developed detailed organizational structures given its numerous implementers and programs that could potentially cause confusion for end-use customers, trade allies, and program implementers. A good example includes how we have clearly delineated lines between commercial and industrial customers and between small and large businesses. Each of these areas has distinct programs, implementers, and customers, so careful planning and organization is required to identify the best methods for approaching customers and how to allocate savings. Similarly, APTIM manages pilot programs for specific measures and approaches within these areas that could further complicate the market. By developing clear definitions, policies, procedures, and marketing and outreach strategies, APTIM manages to ensure all parties, including end-use customers, understand which programs to rely on to meet their energy efficiency goals. ***The total program offerings are effectively presented in the updated and engaging Focusonenergy.com website, which won a dotCOMM Gold award in 2023 for its website redesign.***

5. Energy efficiency program design based upon set savings goals and/or budget parameters.

APTIM has designed numerous energy efficiency programs to achieve quad (four year) and annual target savings goals, customer satisfaction goals, rural market goals, and utility equity goals, while remaining within budget. Efforts have included designs for entire portfolios of programs for Focus on Energy, Entergy New Orleans, and Entergy Louisiana, as well as for individual programs for many utilities across the country, such as Southern California Edison, Beauregard Electric Cooperative, and ComEd. APTIM was asked to assume these mature programs from other implementers, as well as dozens of pilots and new design initiatives.

With Focus on Energy, these statewide program designs reflect quad savings goals, cover natural gas and electric measures, and extend across multiple utility territories, akin to the statewide energy efficiency program being developed by the Public Service Commission in Louisiana. As we expect will be the case with Louisiana, the program designs in Wisconsin must be reflective of goals that extend beyond energy savings. For instance, one goal is to ensure spending in each utility's territory matches their contribution to the program to prevent rate payers in one utility territory from over-subsidizing rate payers of another's territory. These designs also reflect other types of goals, such as serving rural customers, meeting cost

effectiveness targets, or achieving key policy initiatives, such as supporting rural broadband expansion.

Since being selected as Program Administrator for Focus on Energy in 2011, ***APTIM has assisted with three quad plans, totaling more than \$1.1 billion in rate payer funds and more than 5.6 billion kWh and 208 million therms in net energy savings.*** These quad plans have covered more than 36 implementation programs, 18+ pilots through the Administrator, dozens of pilots administered by implementer teams, and approximately 15 research projects, as well as innovations in program delivery, market segmentation, and implementer payment mechanisms. More recently, APTIM was tasked with planning for the *Home Energy Rebate Programs* funded under the Inflation Reduction Act, which will be administered by the Focus on Energy program by APTIM as its Program Administrator.

APTIM also has been hired to assist utilities in reviewing and pulling lessons learned from others program designs. For instance, Southern California Edison (SCE) has hired APTIM to track Demand Response (DR) emerging technology pilots across California to document real-world operational settings and promising deployment strategies—leveraging results that can be applied to demand response research and work. In this role, APTIM maintains a database of over 120 demand response pilot reports, representing the research of the California Investor-Owned Utilities' *Demand Response Emerging Technology* programs. APTIM reviews pilots and demonstration projects to distill key take aways for these technologies, designs, and implementations. We assess both qualitative (i.e., resident comfort feedback/willingness to adopt, etc.) and quantitative data (i.e., tech unit energy efficiency/greenhouse gas reduction/wattage loss, etc.) to inform improvements. For one specific deliverable, ***APTIM reviewed nearly 60 pilots and demonstration projects throughout California and was able to identify best practices that made these programs more likely to succeed.*** This is part of a larger body of work supporting SCE's *Demand Response Emerging Technologies* program. Our role and that of the client's department within SCE is to inform improvements to the effectiveness of existing DR programs or those going into effect via late-stage technical and scaling pilots.

6. Confidentiality rules/restrictions, including the ability to protect customer specific information and data, and has abided by such in the past.

As the Focus on Energy Program Administrator, APTIM has been responsible for developing all IT security and confidentiality policies and procedures and training all new Focus staff, as it relates to the client's Microsoft Office 365 database and SharePoint intranet site. ***To date, there have been no security incidents where customer data was compromised.*** APTIM has a dedicated Compliance Manager who develops and administers IT security training, along with tracking any suspected security incidents, in close collaboration with the client. The Compliance Manager ensures all new staff receive IT security and confidentiality training and execute a certification form prior to receiving access to the Focus Database and SharePoint site. This

training is refreshed annually, and all Focus contractors must attest to their understanding of any new or updated policies and procedures. Through frequent engagement with implementors, subcontractors and vendors, the Administrator has nurtured these relationships such that these program contractors feel comfortable reaching out to the Compliance Manager as needed to seek guidance about potential incidents (most of which are phishing attempts). These communications have the added benefit of keeping the Compliance Manager aware of current phishing strategies employed by bad actors so these experiences can be shared across the team. All IT systems users must use Focus on Energy credentials to access the Database or the SharePoint site where multi-factor authentication and Microsoft Defender Advanced Threat Protection (ATP) are employed to ensure access is secure. Focus on Energy policies require system users who leave the project to be deactivated on their last date of work. Dormant users are monitored and deactivated on at least a quarterly basis.

7. *The ability to hire/vet implementation contractors to ensure the highest quality of vendors are being utilized.*

Focus on Energy has procurement policies and procedures in place to ensure Focus contractors are of the highest caliber with the requisite experience, whether that is for implementing a program, providing digital support services for website enhancements, or providing research for pilot program development—the process is the same. All contractors who have a budget in excess of \$10,000 annually must engage in RFP or RFQ processes before being selected as a contractor. However, if there is a strong business case to award work to a designated entity, the client can provide sole source approval. On average, Focus on Energy issues approximately one to two RFPs per year, which are managed by the Procurement Lead who ensures Focus procurement policies and bid evaluation procedures are scrupulously observed. The bid evaluation team is comprised of APTIM staff, the PSC and utility representatives. The Procurement Lead provides IT security and confidentiality training to all Focus staff and the bid evaluators participating in the RFP process.

Typically, the RFP procurement cycle is approximately six months long, beginning with (1) planning, (2) developing and drafting a solid RFP, (3) seeking client approval for the RFP, (4) coordinating with the client and utilities to identify bid evaluation committee members, (5) training the procurement and bid evaluation committee on policy and procedures, (6) reviewing bid proposals, scoring them and selecting candidates to interview, (7) interviews, and finally, (8) selecting a successful bidder and entering contract negotiations. All is tightly controlled to protect the integrity of the procurement process to prevent any bid challenges from an unsuccessful bidder.

To be able to identify qualified candidates, APTIM has implemented a rigorous scoring system that ties to the RFP requirements. Examples of Key Program Design Elements and tasks we expect a bidder to describe:

- ▶ Approach and strategy for final program design and implementation

- ▶ Approach to providing equitable participation opportunities upon launch to customers across the state of Wisconsin
- ▶ Trade Ally network development and onboarding process
- ▶ Customer journey/experience, including how utility customers will be introduced to the program, how they will be supported, and their experience; consider providing a flow chart demonstrating how this will take place
- ▶ Planned energy efficiency measures and/or services offered
- ▶ Consideration of diversity, equity, and inclusion in program design ensuring all eligible utility Customers can participate
- ▶ Experience with and suggested approach regarding Income Qualified Customers
- ▶ Approach to coordination with other Implementers
- ▶ Approach to coordination with Utilities
- ▶ Details on offerings and launch timelines for alternate offerings not covered in core program scope or budget
- ▶ Outreach and Communication plan to stakeholders: Manufacturers, Distributors, Trade Allies, Utility Customers, Focus on Energy Program staff and Utility Staff
- ▶ Incentive Application Processing
- ▶ QA/QC
- ▶ Evaluation Support
- ▶ Budget Management and Forecasting
- ▶ Tracking, reporting and analytics
- ▶ Administration and program compliance
- ▶ Diversity, Equity, and Inclusion
- ▶ Bidder references

APTIM, at the corporate level, also has a robust procurement staff and system to handle the many subcontractors utilized across our projects. These systems have been audited by federal agencies given APTIM's role in managing large federal projects, which in some cases have more than 100 subcontractors spread across multiple continents and cover billions of dollars in funding.

With our role as Program Administrator for Focus on Energy, APTIM continuously courts new implementers and pilots to stay abreast of best practices, leading implementers and innovative upstarts capable of ensuring the program exceeds its quad goals.

As a result of these rigorous processes, APTIM is well-positioned to provide Louisiana with insights into new implementers, program designs, and technology that can lead Louisiana's programs forward.

8. Familiarity with financial systems for energy efficiency programs in order to coordinate payments between utilities and implementing contractors or utilities and incentive payments to end-use customers, including the review of invoices and program contracts to ensure the work is performed satisfactorily.

Given APTIM's size (>\$1 billion in annual revenues) and our role in managing large, complex programs, such as for the Department of Defense, APTIM maintains a large and sophisticated accounts payable team, backed by robust audited financial and IT systems. In total, over the past 20 years, **APTIM has managed more than \$1.5 billion in energy efficiency funding and oversees nearly \$100 million annually in incentive payments to end-use customers and trade allies across more than 1 million projects.** These efforts extend also to invoice review, contract management, and payment to implementation contractors, which, in the case of Focus on Energy, has amounted to more than 42 implementers, subcontractors and vendors in a single year. In addition to facilitating payments, APTIM engages with the Focus on Energy Fiscal Agent to troubleshoot lost payments and check re-issues and has developed extensive internal processes to ensure re-issued checks are promptly paid.

In many instances, APTIM directly pays customers, trade allies and implementers. In 2023, **APTIM's accounts payable team issued over 6,400 payments totaling over \$8.9 million incentive funds for the Entergy New Orleans program alone.** Payments to Entergy New Orleans customers include mailed checks and program participation letters; program trade allies are eligible for electronic ACH deposits. APTIM provides invoice-to-budget trackers for Entergy detailing implementation, incentive, Key Performance Indicator (KPI) and performance invoicing each month.

In each case, APTIM is responsible for ensuring the work has been performed successfully and meets program rules. With Focus on Energy, all program payments are reviewed by a third-party compliance agent, reporting directly to the Public Service Commission. The compliance agent reviews each expense to ensure it meets the strict program spending rules. Since becoming the Focus on Energy program administrator, APTIM has achieved nearly spotless compliance audits. APTIM has further monitored implementer compliance and their annual audit findings have reduced significantly, as well.

9. Experience in branding and messaging of energy efficiency programs for adequate penetration in the various markets, including but not limited to low-income/energy burden households and renters, as well as consistent marketing statewide.

As TPA and Program Administrator, APTIM leads marketing efforts for the programs and maintains a cadre of internal and external marketing experts to drive branding and messaging, including five dedicated marketing specialists in Louisiana and seven dedicated marketing specialists for Focus on Energy, as well as two dedicated digital support staff. Thanks to these strong teams, APTIM has won more than 80 industry awards, including:

- ▶ Hermes Platinum (4 times)

- ▶ Hermes Gold (19 times)
- ▶ dotCOMM Platinum (2 times)
- ▶ dotCOMM Gold (4 times)
- ▶ Marcom Platinum (4 times)
- ▶ Marcom Platinum (6 times)
- ▶ ENERGY STAR® Partner of the Year Excellence Award (6 times)
- ▶ ENERGY STAR® Partner of the Year (6 times)
- ▶ ACEEE Fourth National Review of Exemplary Energy Efficiency Programs (2 times)
- ▶ Association of Energy Services Professionals (AESP)
 - Outstanding Achievement in Non-Residential Marketing & Customer Engagement - Higher Education Energy Efficiency Initiative
 - Outstanding Achievement in Residential Marketing & Customer Engagement - Wisconsin Is In (Focus on Energy)
 - Outstanding Achievement in Marketing & Communications - Residential (AEP Ohio Community Energy Savers)
- ▶ Viddy Award – Gold for video series on Net Zero Home construction

APTIM also has led the development of rebranding and messaging for the Focus on Energy program across the state of Wisconsin that included developing a revamped website and tag line. Additionally, ***APTIM's social media team has penetrated the social media markets by increasing reach by more than 357% for Instagram, 9% for Facebook and 23% for YouTube.*** Since APTIM's marketing role extends to all customer segments and to the program branding overall, APTIM's role has included developing specific marketing for low-income/energy burdened households and renters. Indeed, we are particularly proud of efforts funded by the Joyce and MacArthur Foundations in Wisconsin that allowed the Focus on Energy program to significantly expand participation and energy savings among these populations. For instance, we developed a joint marketing effort with our implementer and area food banks to distribute more than 500,000 energy efficient light bulbs to their users. In another case, we worked with the association of the largest nonprofit affordable housing owners, Stewards of Affordable Housing for the Future (SAHF), to recruit their members to undertake free energy assessments and energy efficiency upgrades, which resulted in 1,200 units of housing being directed to Focus on Energy's *Multi-family Direct Install* program.

One of APTIM's KPIs is to target offerings to rural communities. Focus on Energy in Wisconsin has made significant strides to increase energy efficiency and reduce the energy burden for rural customers. This initiative was in response to an investigation by the PSC in 2016, which

identified significant barriers preventing customers in rural areas from benefiting from energy efficiency programs.

With the support of the PSC, in 2018, Focus on Energy initiated a rural residential behavioral pilot program called the *Save to Give* pilot program. Retail offerings for rural customers were also enhanced through various channels, including community events and rural food banks.

In terms of performance metrics, the Commission set a KPI to target 31% of incentive spending in 2023 and 2024 for projects taking place in rural-designated ZIP codes in the state, proportional to the state's rural population. This KPI ensures a minimum spend amount for rural customers.

Additionally, APTIM was directed to gather data and perform analyses in the first year of quad IV to better identify underserved customers, target program offerings, and develop additional KPIs. These efforts are targeted towards customers with the highest energy burdens and small business customers.

Notably, efforts to serve rural customers go beyond expanding and improving program offerings. They also include strategies to reduce customer barriers to applying for program incentives and conducting customer satisfaction surveys to ensure the satisfaction of rural customers. Moreover, the *Save to Give* pilot program explores the efficacy of behavioral strategies and program designs on rural Wisconsin customers for potential integration into the broader Focus on Energy portfolio.

10. Experience in drafting, or assisting in the drafting, of a Technical Reference manual, or similar document.

APTIM, as the Focus on Energy Program Administrator, plays a crucial role in coordinating the update process for the Technical Reference Manual (TRM). APTIM closely collaborates with the implementing staff, evaluation team, and the PSC staff to review all proposed metrics and amendments. APTIM also serves as a facilitator for the TRM-related decision-making process. They help to organize and mediate discussions between implementing staff (who may propose new measures or revisions), the evaluation team (who ensure the rigor and validity of energy-saving calculations), and the PSC staff (who provide oversight and final approval). This process is intricate, as it requires a fine balance between ensuring the greatest efficiency outcomes and maintaining a practical, implementable set of standards for program stakeholders.

APTIM and the evaluation teams work hand-in-hand in the TRM update process. The former plays an oversight role on the implementation side and ensures that the updating processes align with overall Focus on Energy programs' designs. The evaluation team, however, is responsible for reviewing and verifying the methods used for estimating energy savings in the proposed revisions.

In addition, APTIM ensures all review requests are coordinated and tracked effectively using the project task management tool, Wrike. As part of the tracking process, APTIM captures essential details related to the update requests, the implementation process, outcomes, and any lessons learned. These steps are crucial to consistently improve future TRM updates.

Ultimately, APTIM ensures Focus on Energy standards are met, the TRM is continually updated to reflect the best practices, and that the TRM remains a trusted resource for those involved in the energy efficiency programs in Wisconsin.

11. Experience in producing Program Plans and Annual Reports.

APTIM has been responsible for producing Program Plans and Annual Reports on every program administered and implemented by our teams. This includes statewide planning and annual reporting for Focus on Energy's programs since 2011 and for Entergy New Orleans and Entergy Louisiana since 2017 and 2018 respectively. We have experienced in-house marketing and program staff who lead these efforts, including five dedicated marketing staff in Louisiana. The APTIM team serving Entergy Louisiana also provides monthly reports showing program participation in each Public Service Commission District designed to keep Commissioners and their staff up to date in current participation rates within their District.

In addition, APTIM has developed innovative reporting, such as the *Impact Report* for the City and County of Denver's *Home Energy Rebate Program*, which documented annual results, but also the challenges and opportunities for increasing participation by hard-to-reach residents and contractors.

12. Ability to have at least two local offices, including at least one call center, within Louisiana with qualified people who are knowledgeable on energy efficiency and the State of Louisiana.

APTIM's international headquarters are in Baton Rouge. Additionally, APTIM has eight more offices located in Louisiana and a total of 327 employees, including 17 staff working full-time in APTIM's role as Third Party Administrator for both Entergy Louisiana and Entergy New Orleans. This staff is knowledgeable in energy efficiency program design, administration, delivery, and conservation measures, and our plan is to leverage this staff for this work (resumes for key staff are available upon request). APTIM also maintains call centers for both Entergy New Orleans and Entergy Louisiana's energy efficiency programs in the state with employees who are knowledgeable of both energy efficiency and the State of Louisiana.

The Call Center performance metrics APTIM has achieved through its Madison, Wisconsin Call Center for Focus on Energy, which are inclusive of after-hours calls, demonstrate our commitment to customer service:

- ▶ Number of calls: 58,533
- ▶ Average call handling time: 2 minutes

- ▶ Average wait time: 8 seconds
- ▶ Voicemail Processing: 100% returned within one business day

13. Experience facilitating smooth transitions of utility-led EE programs to third-party administered ones.

APTIM has significant experience overseeing smooth transitions in administration and implementation of utility-led energy efficiency programs. Examples include being selected to assume the role of Administrator of Focus on Energy in 2011, re-bidding on the Administrator role and being selected in 2018, and being re-awarded the Administrator role in 2022. Despite the challenges in transitioning an entire portfolio of commercial, industrial and residential programs from the previous administrator in 2011, having to hold RFPs for every program, and negotiating contracts with more than eight implementers, ***the Focus on Energy program exceeded its quad annual verified gross savings goals*** (achieving 121% of annual verified gross kWh and 111% of verified gross therms goals) and was ***deemed the most cost-effective program in the country by Lawrence Berkeley National Laboratory as announced in WisBusiness News***. The Berkeley study broadly examined 41 energy efficiency programs funded by utility customers that were started between 2009 and 2015. After comparing the programs, the study found the cost of saved electricity for Wisconsin's Focus on Energy program is one cent per kilowatt-hour saved—the highest rate of energy savings per dollars spent for all programs included in the study.

Another good example comes from our role as TPA for Entergy Louisiana's energy efficiency programs in 2018. APTIM was able to re-launch programs that had been dormant for more than a year and was able to ramp up to deliver 110% of savings goals in the initial 20-month program cycle.

In addition, as Administrator of Focus on Energy, APTIM has been tasked with transitioning a wide array of utility-led programs into the Focus on Energy program. Examples include several voluntary programs undertaken by utilities for their specific utility territories, such as We Energies' *Design Assistance Program*, which has been a part of Focus on Energy since 2019. Others include a large portfolio of programs offered specifically by WPS for its customers in 2011 and 2012.

Beyond just administering these programs, APTIM has also transitioned implementation of utility-led programs to a third-party, APTIM. Examples include our work with residential and commercial customers for Entergy Louisiana (since 2018) and Entergy New Orleans (since 2017) but would extend to multiple other programs across the country.

One particularly challenging transition involved our work with commercial real estate in ComEd's territory that involved transitioning efforts being undertaken by the utility as well as another

implementer. ***APTIM successfully brought both elements together into a single program implemented that exceeded the first year's savings goal by 170%.***

Conflict of Interest

A Firm indicating interest under this RFQ shall prominently and separately disclose current, as well as past, employment which could possibly result in a conflict of interest. Potential conflicts could include, but are not to be limited to, employment (past or current) with regulated utilities, affiliates of regulated utilities, consumer advocacy groups, or any other party that comes before the Commission. In addition, Applicants shall disclose matters in which they currently represent clients before the Commission. Please note that employment with any of the above is not considered an automatic conflict of interest.

APTIM has, or has had, contracts with Beauregard Electric Co-Op, Cleco, Entergy Louisiana, Entergy New Orleans, and Entergy Services, but to the best of our knowledge, we are not aware of any potential conflicts of interest.