

COVER LETTER

April 4, 2024

Louisiana Public Service Commission
602 North Fifth Street (Galvez Building) (70802)
P.O. Box 91154
Baton Rouge, LA 70821-9154

Dear Ms. O'Brian and Ms. Bowman:

Frontier Energy, Inc. (Frontier) is pleased to respond to the Commission's Request for Qualifications (RFQ) for a Program Administrator.

We acknowledge and accept the terms described in the RFQ and in the Commission's Phase II Rules and guarantee our firm possesses the requisite minimum qualifications and experience outlined in the RFQ.

Our firm has worked behind the scenes since 2017, assisting two Louisiana electric utilities navigate the transition to utility-led programs and find success under the Commission's Phase I Quick Start program rules. We believe our experience assisting these utilities with activities touching on all aspects of the energy efficiency lifecycle uniquely positions us to help transition the state from multiple utility-led offerings to a single statewide program, cost-optimized to maximize benefits for the Louisiana customer base under the Phase II Rules.

We truly appreciate the opportunity to participate in this process and hope the qualifications presented herein allow us to continue to the Request for Proposal phase and beyond.

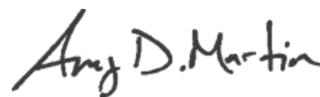
The Frontier team looks forward to attending the Commission's bidders' conference. Should you have questions regarding this response, please do not hesitate to contact us.

Sincerely,



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Qualifications for Program Administrator

April 4, 2024



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OVERVIEW

Frontier appreciates the opportunity to submit our qualifications to the Louisiana Public Service Commission (LPSC) to design, implement, and oversee a statewide multi-year portfolio of energy efficiency (EE) programs for the customers of Louisiana.

Since 2017, our firm has worked behind the scenes to assist two of the jurisdictional Electric Investor Owned Utilities with their Quick Start programs under the Commission's Phase I EE Rules (SWEPCO and Cleco). Our experience assisting these utilities with activities touching on all aspects of the energy efficiency lifecycle (including regulatory support, general consulting, program design, implementation strategies, software development, reporting, data analytics and additional services) uniquely positions us to help transition the state from multiple utility-led offerings to a single statewide program, cost-optimized to maximize benefits for the Louisiana customer base.

Frontier is equally experienced in serving Natural Gas utilities. In Texas, for example, Frontier administers Atmos Energy's Mid-Tex Gas Appliance Rebate Program and consults with Atmos on its Keeping the Warmth Low Income Weatherization Program. For the Appliance Rebate Programs, Frontier developed a program design and on-line database application that enables customers to apply online or via mailed-in applications. For the Low Income programs, Frontier helped Atmos develop data collection tools necessary for accurately calculating savings and cost-effectiveness metrics, which enables participating agencies to combine weatherization funding from Atmos with funding available from other utilities and the federal government.

Moreover, we believe the foundational groundwork we have developed for our utility clients in Louisiana provides a solid jumping-off point to transition the programs into a successful statewide offering in a timely and efficient manner, saving Louisiana ratepayers money by adapting and using the existing tools, procedures, and institutional knowledge required to achieve success.

Specifically, our team brings three core components to the table, briefly highlighted below:

1. Software Solutions (Data tracking & reporting)

- a. Frontier's Program Portfolio Portal (P3®) is the flagship product offering from our EnerTrek software division, developed using the latest technology and best practices in software design. P3 is being used by over 40 utilities including SWEPCO Louisiana and Cleco. It is a comprehensive and robust platform within which multiple energy efficiency programs are tracked. P3 streamlines program participation, management, reporting, and evaluation processes and easily accommodates changing program requirements. We believe this tool will be instrumental in merging other utility details into a single source and is expandable to cover both electric and gas EE program designs.

2. Louisiana Deemed Savings Engine (DSE)

- a. The DSE is a proprietary solution that centrally manages and facilitates deemed and custom savings calculations and installation requirements based on the latest version of the appropriate technical reference manual (TRM) or other governing documents. Frontier developed and actively maintains the Louisiana DSE in accordance with Phase I Rules and with guidance from SWEPCO and Cleco's evaluation, measurement, and verification (EM&V) contractor. This tool can be adapted to include additional measures, including both energy and gas efficiency offerings, and will be in alignment with the official statewide TRM developed under the Phase II EE Rules.

3. Local Relationships and Understanding of Louisiana Service Territories

- a. Through our existing work with SWEPCO and Cleco, our team has developed relationships with the utilities and other stakeholders operating within the state's EE framework, including trade allies, implementers, and local contractors who interact with our P3® tracking system on a daily basis. We believe this will help give us a head start over other firms without a current presence across the state.

With this RFQ response, we provide a brief overview of our experience and work to date for Louisiana communities and beyond. We look forward to the opportunity to expand on our experience during the Request for Proposal process.

MINIMUM REQUIREMENTS

Established in 1981, Frontier Energy, Inc. (Frontier) is an engineering and consulting firm with a strong record of delivering energy efficiency solutions for commercial, industrial, and residential sectors.

The firm's expertise encompasses demand-side management, software development, building research and consulting, commercial foodservice efficiency, and transportation and power. Frontier's 180 employees across seven U.S. offices provide the highest caliber of energy efficiency and engineering services, applying in-depth knowledge of emerging and established technologies to create exceptional solutions, customized to clients' needs and local conditions.

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Frontier staff have worked in Louisiana since 2008, when we performed a qualitative assessment of energy savings potential for SWPEPCO to determine which measures would be cost-effective for program implementation. Frontier has continued to support SWEPCO in Louisiana with services related to deemed savings development, program design, software for tracking and reporting—using Frontier's Program Portfolio Portal (P3) platform—and cost-effectiveness analysis.

Since 2018, Frontier has also provided program support for Cleco's energy efficiency portfolio, providing regulatory support, program design and development, software solutions, and implementation services, including Power Wise Residential Equipment Rebate Program.

Frontier supports clients through every stage of the program lifecycle, from regulatory consulting and program design to implementation and turnkey fulfillment, including: outreach, audits and technical assistance, post-installation inspections, customer support and rebate processing, program management, trade ally and contractor development and management, measurement and verification (M&V), and comprehensive software solutions for program tracking.

Through designing and implementing programs, Frontier staff work with a broad range of stakeholders including acting as a point of contact or liaison for each of the entities outlined under Minimum Requirement number 1 within the RFQ. Most of our direct contact involves our work in Texas, New Mexico, and Louisiana and is focused on public utilities, PUC Commissions & staff, statewide evaluators, EE contractors, and EE Working groups (including the Texas Energy Efficiency Implementation Project led by the Texas PUC). We also work with state and federal agencies to a lesser extent. We will be happy to expand on this experience during the RFP process.

ORGANIZATIONAL, FINANCIAL, AND DATA TRACKING ABILITIES FOR BOTH INDIVIDUAL PROJECTS AND OVERALL PROGRAMS

The LPSC may be assured of Frontier's financial viability, as evidenced by our long history of successfully providing consulting and implementation services in support of multiple energy efficiency programs. In addition, Frontier has the full support of our parent company GTI. For more than 75 years, GTI has provided economic value to the energy industry and markets by developing technology-based solutions for industry, government, and consumers. GTI programs have resulted in nearly 500 products, 750 licenses, and more than 1,300 associated patents.

Frontier's Demand Side Management team consistently manages millions in revenue annually in energy efficiency program contracts in several states. We interact with hundreds of contractors and market actors, thousands of customers, and pay out thousands of incentives annually by check or electronic transfer. We accomplish all of this by developing and implementing business processes that ensure all payments are made accurately and in a timely manner.

92% of the customers interviewed indicated they would recommend Frontier to their colleagues in the industry.

Frontier utilizes enterprise resource planning software (Deltek Vision) to manage the complete project lifecycle, enabling the automation of business information communication between different business departments. We track every contract, task, employee, and vendor to ensure every payment undergoes at least two levels of review before being approved, and to track performance against financial goals and other key performance metrics defined by contract. We maintain contracts with dozens of utilities; industry clients; local, state, and federal government agencies; and non-profit organizations to perform critical work. We work with hundreds of contractors and vendors within these programs.

Frontier's data systems are secure, ensuring privacy of contractual as well as customer information. Frontier completed a Service Organization Control (SOC)® Type 2 audit in 2023 with no exceptions.

Corporate departments that provide support for programs at Frontier include Contracting, IT, Accounting, and Human Resources. All Frontier-administered programs have the executive oversight of a vice president, who consults on staffing, supports contracting, and provides overall guidance, as needed. A program manager or director leads day-to-day activities carried out by a team that has appropriate skills and experience to ensure full coverage of all program components and tasks.

All program/project teams embody Frontier's outstanding record of delivering excellent customer service to our clients, contractors, and customers. Every two years, Frontier hires an independent consultant to assess customers' satisfaction with our performance. Through one-on-one interviews, our customers have shared their experiences working with the Frontier team. We incorporate their feedback and suggestions for improvement into our performance, continuing to earn our customers' business and their trust. In 2022, 92% of the customers interviewed indicated they would recommend Frontier to their colleagues in the industry.

For program data tracking and reporting, Frontier designed the P3 platform to promote consistency; boost the accuracy of deemed savings and incentive calculations; and to streamline program participation, administration, and evaluation processes. Leveraging the latest technology and best practices in software design, the P3 platform features a single user interface for all energy efficiency programs within a portfolio. The platform is built flexibly and is highly customizable to easily accommodate future program requirements and changes through user-driven system configurability. Robust reporting capabilities put portfolio performance at the user's fingertips and customizable workflows can be designed to suit the circumstances of individual programs. A user-friendly interface makes participation simple for utility customers and trade-allies, while extensive online and in-person training and help-desk support is available for clients.

Included with every P3 deployment is access to Frontier's Deemed Savings Engine (DSE) tool. The DSE is a proprietary solution that centrally manages and facilitates deemed and custom savings calculations and installation requirements based on the latest version of the appropriate TRM or other governing documents. The DSE eliminates the need for individual tracking systems to be updated as measure calculations evolve. This central deemed savings management approach directly promotes consistency and accuracy across utilities' programs. The DSE currently supports energy savings calculations in 7 states as well as custom calculations requested by 4 utilities.

In tracking SWEPCO and Cleco's energy efficiency programs, Frontier has developed and maintained a library of approved residential and commercial measures that can be utilized throughout the state of Louisiana.

Utilities in Louisiana, Texas, New Mexico, Illinois, Minnesota, and Vermont are currently using P3. SWEPCO, for example, has 12 Texas programs and 10 Louisiana programs managed and documented within P3.

Frontier also brings many years of experience working with utility clients' in-house data platforms and with using Salesforce for program tracking, reporting, and customer-facing forms.

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

The Frontier team provides data monitoring and tracking for all the energy efficiency programs we administer for the purposes of program reporting and to gauge progress toward goals and support course adjustment, as needed. Via the P3 platform, Frontier's software team services and maintains a vast set of historical energy efficiency program data from across the United States (including Louisiana) in a relational database management system tailored to the specific tracking and reporting needs of utilities. Data are readily queryable and stored at measure-level granularity, granting analysts access to a wide array of variables used to produce engineering estimates, deemed savings, and rate calculations, all of which come together to produce program and portfolio-wide performance statistics and key performance indicators. Frontier regularly leverages this unparalleled program insight to assess root cause issues influencing project uptake and, using this insight, collaborates with utilities to modify program designs in such a way that potential issues are mitigated and opportunities are capitalized on.

Frontier currently tracks and monitors energy efficiency program performance for both Cleco and SWEPCO. Using information tracked in our P3 systems, our data analytics staff are able to slice and dice data to determine where projects are being completed (geographically and by building type), which EE measures are being installed at the highest (and lowest) rates, if incentive levels appear to be in line with contractor and client expectations, if cost-effectiveness is at targeted levels, and numerous other metrics to help the utilities determine if the programs as designed and implemented are meeting expectations in terms of both savings and overall budgets.

Under a statewide program, the Frontier team will take the same data-focused approach to develop analytics and illustrate program success failure rates in a manner ultimately ensuring the EE programs offered are cost-optimized, hitting targeted goals and maximizing benefits to Louisiana customers.

Below are two examples of Frontier's ability to analyze track data and illustrate the success/failure rate from two different angles.

Annual Program Performance Review & Incentive Analysis (Louisiana & Texas Utilities)

Each year, at a utility's request, the Frontier team will review program performance to determine if it is meeting expectations or if design tweaks may be required. First, program metrics are determined in collaboration with the utility (and program implementer, as needed). In most cases, regulatory requirements (including budget targets and cost-effectiveness mandates) take precedence, then utility-specific targets are addressed (this may involve a variety of factors including success targeting certain economic markets, geographic areas, or other factors deemed important by the utility).

Based on this, the Frontier team will develop and run the analytics required to determine results; this may include evaluating additional cost-effectiveness tests (beyond the Total Resource Cost Test), or data points including contractor payment per kWh, percentage of administrative dollars

compared to incentive dollars, percentage of savings from low-income targets, and similar metrics. Program recommendations are made based on this analysis and the utility and/or program implementor may choose to modify its design to better meet identified program success metrics.

CPS Energy – Program and Portfolio Evaluation

The Frontier team also brings strong evaluation, measurement, and verification (EM&V) experience assisting clients who require a deeper dive into program data to better understand how their programs are performing and to support strategic decisions for future program design. Since 2015, Frontier has served as the third-party evaluator of CPS Energy’s portfolio of more than 20 residential and commercial energy efficiency and demand response programs, referred to as the Save for Tomorrow Energy Plan (STEP). Frontier’s work includes program design review, evaluation of implementer proposals, and EM&V including building simulation modeling and development of load shapes, process and impact evaluation, cost-effectiveness analysis, recommendations for improving program performance, and addressing impacts of the City of San Antonio’s transition to 2015 International Energy Conservation Code requirements.

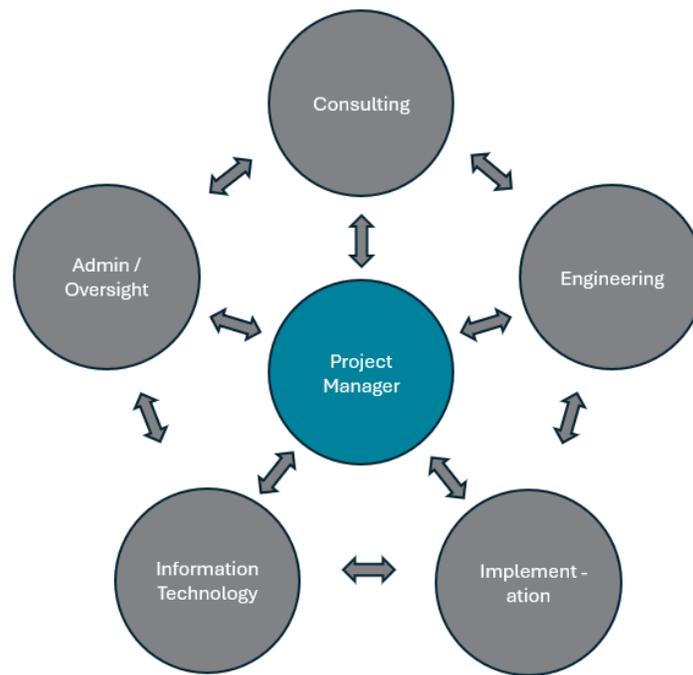
Since 2015, Frontier has served as the third-party evaluator of CPS Energy’s portfolio of more than 20 residential and commercial energy efficiency and demand response programs, referred to as the Save for Tomorrow Energy Plan.

Frontier staff perform savings analysis on demand response events for residential electric vehicle (EV) managed charging program, residential smart thermostats, bring-your-own thermostats, behavioral demand response, and commercial load management using statistical models and AMI data.

We use both regulatory standard success metrics (cost-effectiveness) and utility-determined metrics (net benefits targets, qualitative goals, etc.) to evaluate if a program is successful or at risk of failure based on one or more factors.

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

Frontier has deep experience in successfully managing complex, multi-stakeholder projects. Internally, several teams with specific roles and capabilities contribute to each project: consulting, engineering, implementation, information technology, and administrative/oversight. These teams are typically coordinated by a project manager, who is responsible for clearly communicating between teams and orchestrating work toward meeting identified needs.



The project manager’s role involves the coordination of project planning, resourcing, managing, communicating, delivering, reporting, and analyzing the project. The project manager ensures all goals are on track to being met, tracks budgets and workloads, identifies and resolves issues as they arise, and recommends improvements as needed.

Members of the various functional teams have the following responsibilities:

<p>Consulting</p>	<ul style="list-style-type: none"> • Understand statewide rules and communicates to other teams • Ensure programs are cost-effective • Develop incentive structure for programs • Allocate funding to different activities
<p>Engineering</p>	<ul style="list-style-type: none"> • Maintain library of state-wide energy efficiency measures • Develop and document measure calculations and keep up-to-date with statewide codes and standards • Obtain approval from evaluator for measure updates • Communicate with Implementation and Software teams about new and updated measures • Test software team measure calculations accuracy
<p>Implementation</p>	<ul style="list-style-type: none"> • Design programs • Serve as point of contact for program participants, such as contractors/trade allies, utilities, and others • Ensure programs comply with rules/regulations and are cost effective. • Ensure goals are met • Vet participating contractors • Create program documentation • Pay incentives to participants • Perform inspections

	<ul style="list-style-type: none"> • Communicate program requirements to software team
Information Technology	<ul style="list-style-type: none"> • Work with Engineering staff to gain understanding of measure calculations and requirements and receive verification/sign-off that tracking system savings calculations are accurate • Works with Implementation staff to configure system to meet program requirements • Ensure tracking system is accessible • Maintain system documentation • Perform necessary system maintenance and feature enhancements to facilitate program implementation duties • Ensure data integrity • Ensure system meets all security requirements • Automate reporting and provide reports to appropriate stakeholders
Administrative and Oversight	<ul style="list-style-type: none"> • Generate all required invoices and payments; review budget and manage cash to enable rapid payments where necessary • Track hours worked, internal costs, and ensure regulatory requirements are met

When implementing specific programs or projects, Frontier’s standard operating procedure involves authoring both a Program Manual and an Operations Manual. The Program Manual is typically an outward-facing document intended for consumption by participants and potential participants. It lays out the program’s purpose and key contacts, and then details eligibility requirements, budgets and incentives offered, the participation process, and quality assurance procedures. Although they can be updated at any time, Program Manuals tend to be updated infrequently, and serve as a reference point for how a program works.

The Operations Manual is an internal document that describes program processes to those who are implementing or administering the program. It typically describes who is responsible for what tasks, how handoffs are made between administrators, and when communications should be made to participants and others (as well as the recommended content of those communications). In contrast to Program Manuals, Operations Manuals are typically living documents, updated as new issues or improved workflows are identified by the project team.

Implementation of CenterPoint Energy’s Agencies in Action Low-Income Weatherization Program
 Since 2008, Frontier has served as the implementer of CenterPoint Energy’s Agencies in Action (AIA) low-income weatherization program in Texas. The program now consists of two main components:

- A single-family component that involves the coordination and support of a dozen or more local agencies that engage in various phases of the home weatherization process, with particular support of City of Houston goals to serve homes in designated “Resilient Communities”.
- A multifamily component that utilizes a competitive bid process to facilitate the replacement of aging heating, ventilation, and air conditioning (HVAC) systems with high efficiency heat pumps.

Clear coordination of multiple parties is essential to the success of the AIA program. For every home that applies, our team manages the referring social service agencies, contracted assessors,

and weatherization and HVAC installation contractors to ensure the homeowner receives comprehensive retrofits that are likely to reduce their energy bills and burden. We also ensure each contractor is paid on a timely basis, and review progress with CenterPoint Energy on a bi-weekly basis. Our record of success speaks for itself: we have been continually under contract with CenterPoint for 16 years.

ENERGY EFFICIENCY PROGRAM DESIGN BASED UPON SET SAVINGS AND/OR BUDGET PARAMETERS

Frontier staff work very effectively with our clients to determine how to accomplish or exceed program goals within allocated budgets. Frontier understands the importance of developing an incentive structure and overall program budget to encourage program participation while maintaining cost-effectiveness and meeting program objectives. In some cases, specific measures may not need to be cost-effective if they encourage overall project participation and can be balanced out with higher saving/lower cost measures. Our team understands this delicate balance and has the experience required to develop measure-level incentive rates and adjust those as necessary based on actual project information over the course of the program.

Frontier can also provide market assessments and surveys of participants to inform savings potential analysis and program design decisions, as well as support for new measure development for promising energy efficiency measures that have the potential to bring savings.

Frontier has designed and administered several long-running programs for our Texas clients that entail ongoing analysis of savings pathways and subsequent program adjustments as market conditions change.

Below we highlight one example of our work with a Louisiana utility as it relates to overall EE portfolio design based on set savings and budget parameters.

Cost-Effectiveness Analysis of Cleco's Annual Energy Efficiency Plan

Frontier has developed comprehensive energy efficiency savings projections for Cleco's PY5 – PY10 portfolios (2019 – 2024) using a robust and finely-tuned cost-effectiveness model that accounts for the evolving needs of the Louisiana energy efficiency market and Cleco's goals, including savings targets and budget parameters.

Through this process, we analyze previous year program performance and recommend if/how the program design (including outreach efforts, measure mix, incentive levels, implementer selection, and other factors) could change to increase program cost-effectiveness, better serve targeted markets within the service territory, or otherwise modify the program to achieve greater success, hit higher savings targets, or meet different budget parameters.

Our well-founded industry expertise, Deemed Savings Engine (DSE), and historical program data records allow us to accurately forecast measure-level deemed savings estimates per program and optimize these measures' rebate levels to incentivize market forces to act while still maintaining program cost-effectiveness. Frontier engages with Cleco at key milestones to tailor final results to budget targets under various scenarios, assessing and providing program design feedback when necessary to assist Cleco in meeting utility objectives under real-world conditions.

Our experience working with Cleco in this manner has helped our team learn about the Louisiana service territories and the challenges faced by each. Although the engineering algorithms and mathematical calculations project savings targets can be met within projected budgets, this does not always mean the contractor engagement or marketing approaches are established to meet these calculated goals. Our role, in addition to data analytics and program planning, is to use our experience to help guide program design changes, approach to outreach, and other implementation strategies to help set the utilities up for success as they strive toward ambitious goals under set budgets.

CONFIDENTIALITY RULES/RESTRICTIONS, INCLUDING THE ABILITY TO PROTECT CUSTOMER SPECIFIC INFORMATION AND DATA, AND HAS ABIDED BY SUCH IN THE PAST

Frontier adheres to all national and state requirements for protecting information. We enforce industry data security and governance standards such as ISO27001 and NIST. Frontier maintains SOC Type 2 Certifications for data security, software development and hosting, and data management. Copies of the latest annual audit certifications are available upon request.

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P3 is an ASP.Net MVC 5 application, written in C#, and hosted as a Microsoft Azure App Service. It uses Microsoft Azure SQL Databases along with Blob and Table storage as the primary data stores, all of which are geo-replicated to prevent data loss. Microsoft's transparent data encryption ensures all data are encrypted at rest. All communication with P3 is over HTTPS to encrypt data in transit. Each P3 client has their own individual data stores that are segregated from other clients' data. There is no limit on frequency or volume of data transfer.

Access Security Protocols

P3 provides secure access to the system through registration, two-factor authentication, and user roles and permissions, as described below.

Registration

P3 users accessing the system are required to enter a unique username and password combination. Frontier will set up user accounts for administrative level users and other users who need reporting features.

Trade ally and customer users can register in the system using the user registration feature. These users will receive an email with a verification link that must be accessed to complete the registration and profile creation process. Depending on the type of user they select, profile forms typically capture company information if they are a trade ally or premise information if they are a customer. These profile forms can be configured to capture additional information if necessary.

Two-Factor Authentication

P3 supports two-factor authentication for added security, which allows users to enable this feature for their specific account. Users will need to download an authenticator application, such as Google Authenticator or Microsoft Authenticator, to their smartphone and either scan a QR code or manually enter a random code to add P3 to the application. The application will then provide a six-digit code that will need to be entered into P3 for verification. Once enabled, users will be prompted to enter the six-digit code provided by the authenticator application each time the user tries to log in. The two-factor authentication feature can also be configured to remember specific devices for any set number of days, thus eliminating the need to authenticate each time the user attempts to log in.

Roles and Permissions

P3 employs permission-based access controls. Each client configuration of P3 can have an arbitrary number of defined roles, and each role has a collection of permissions granted to it. Users can then be granted one or more roles. When a user attempts to access a specific view or feature, the system checks to see if any of their roles have been granted the appropriate permission. The system logs user actions.

THE ABILITY TO HIRE/VET IMPLEMENTATION CONTRACTORS TO ENSURE THE HIGHEST QUALITY OF VENDORS ARE BEING UTILIZED

Frontier’s experience has shown that reputable contractors and other trade partners such as equipment suppliers are key to successful programs. Frontier staff are experts at continuing to recruit and train new contractors at a steady pace and at becoming a trusted resource for them. We prioritize opportunities to engage with contractors, suppliers, and other trade partners at conferences, industry meetings, and various networking events. Over the years, Frontier teams have developed many strong and lasting relationships with contractors and equipment suppliers. We make it our business to know and understand their business models, and we provide excellent customer service. We call back when we say we will, and we work hard to establish personal relationships with the contractors’ in-field and office staff.

Examples of contractor engagement and vetting are briefly summarized below.

Residential and Commercial Solar Photovoltaic Programs

Frontier implements the SMARTSource Solar Photovoltaic Program for AEP Texas Central Company (TCC) and Texas North Company. Frontier vets contractors by verifying required liability insurance coverages; confirming contractors agree that only licensed electrical contractors will offer, perform, and permit all electrical work; confirming contractors have read the Program Guidebook and understand their responsibility to comply with all Program requirements; and confirming contractors employ appropriately-certified employees.¹ Once an installer is selected for participation, we assist AEP Texas with vetting contractors, which assures customers that they will receive quality energy services.

Residential & Hard-to-Reach Standard Offer Programs

Frontier has implemented TNMP’s programs serving residential and hard-to-reach (income-qualified) customers for over a decade. Frontier, along with TNMP, selects potential contractors for participation through an application process that includes review of past projects/work, references, in-person meetings, and contractor capabilities and geographic areas served. Once selected, contractors are granted access to the program software tools to help manage projects and calculate incentives/savings for these completed projects. Frontier ensures that all required contractor documentation is up-to-date and stored in the program software.

Frontier ensures the quality of ongoing and submitted work throughout the program years by providing support to contractors, inspecting completed projects, and reviewing required project documentation. We have even created a “documentation guide” listing data and photos required to document every eligible measure type. Attention to detail is practiced while inspecting work performed and the supporting documentation uploaded to the program software.

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

Frontier has the expertise and tools required to review and approve project details and invoices prior to incentive payment to ensure work is performed satisfactorily. Once projects have been

¹ Our programs require that at least one full-time regionally-based employee is currently certified/determined by the North American Board of Certified Energy Practitioners (NABCEP) as a PV Installer; or (2) employs at least one full-time regionally-based employee who has been determined by NABCEP to be eligible to sit for the NABCEP PV Installer exam; or (3) employs at least one full-time regionally-based employee who has successfully completed at least 40 hours of PV installation training provided by a third party.

sufficiently vetted and approved, our team can coordinate allotted incentive payments among all responsible parties.

Using our P3 system, our rebate processing team has tracked and stored program data for dozens of utilities and hundreds of programs worth millions of incentive dollars.

In 2023, Frontier’s Austin-based program implementation team processed over 12,000 applications, covering nearly 18,000 premises and over 28,000 individual measures for Texas and Louisiana programs. Program structures vary, but payments are usually made either to participating contractors or directly to utility customers.

The workflow is guided by QA/QC plans that Frontier creates at the start of each program year, which identifies the steps for project creation and submittal, desktop review, payment processing, field or visual inspections, and conflict resolutions. In all cases, the team tracks the overall incentive budget to guard against underperformance or oversubscription.

The team routinely performs desktop review of all incentive applications according to each program’s QA/QC plan. Desktop review ensures that all necessary documents are submitted, and that information is complete and correct. Incentives are paid accurately and the data for tracking and reporting are captured. Customer and project information is also vetted to guard against duplicate payments within a program or “double-dipping” between programs.

The team also performs visual or site inspections on a percentage of projects, generally focusing more heavily on the earlier projects each participating contractor performs. Contractors with a record of high performance will still have their projects field-inspected, but less frequently than when they first started with a program. Customers agree to field-inspections are part of their participation agreement. Field inspections are randomly selected to ensure against any bias.

Payments, consisting of checks or ACH electronic transfers, are processed weekly with oversight from the Program Manager. System-generated emails are sent to each payee informing them of the payment.

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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

Frontier staff are skilled at planning, supporting, and conducting strategic marketing and outreach campaigns in support of energy efficiency programs, including multifamily, low-income, small business, upstream/midstream commercial foodservice rebates, and other program designs.

The team starts by refining marketing/outreach needs and goals, and for each goal identifying key targets and messages. Key targets may include contractors and/or customers who already are, or are not, participating in programs, equipment manufacturers or suppliers, industry peers, trade groups, or others.

For each key target, we focus on refining the essential message or story tailored to meet their needs via program awareness. We then identify the most effective pathways for delivering key messages to key targets. These pathways may include direct outreach, white papers, flyers, electronic messages, other digital communications, etc. Finally, we follow through to ensure messages were

received and reinforced, and to provide more information needed to close the deal. Our marketing/outreach team is skilled at leading program teams through this process, and ensuring marketing is efficiently tailored to meet clearly defined program goals.

The Frontier team is adept at applying branding guidelines so that materials are compelling, consistent, and establish the utility or utilities as the “face of the program.” Materials for programs the Frontier team produced include:

- Program manuals and documentation
- Print media, handouts, and brochures
- Identification badging for field work personnel
- Website design and development
- Web content and editable forms
- Social media, email, video, and digital marketing
- Events and trade show exhibits and banners

See Appendix B for select examples of marketing materials we have provided to clients. Highlights from a selection of our marketing efforts for multiple clients are provided below.

Illinois Statewide Commercial Food Service Program

Frontier implements the Illinois Statewide Commercial Food Service, which involves marketing and outreach activities across five different utilities, each servicing a different area of the state. To successfully facilitate this process, our team developed a website (<https://www.il-foodservicerebates.com/>), which has positively influenced participation and increased administrative efficiency.

Low-income Weatherization Energy Efficiency Programs (Multiple Texas Utilities)

Frontier implements several targeted low-income programs across Texas. Our team employs a variety of techniques to identify qualifying participants and involve key stakeholders across targeted service territories to more efficiently and effectively engage contractors to meet regulated spending and energy savings targets. Our general approach involves broad strategies (exact approaches vary based on service territory characteristics):

- Outreach to a wide range of agencies including: housing authorities; weatherization assistance agencies; councils of government; faith-based organizations; municipalities; community development agencies; and local not-for-profits
- Attending community events (alone or in support of utility staff)
- Placing program flyers at selected community centers/neighborhood service centers/churches
- Providing training for and engaging with subcontractors who are able to target participant qualification and measure installation within defined zip codes

EXPERIENCE IN DRAFTING, OR ASSISTING IN THE DRAFTING, OF A TECHNICAL REFERENCE MANUAL, OR SIMILAR DOCUMENT

Frontier has extensive experience with statewide Technical Reference Manuals (TRM) and the deemed savings values at the heart of such documents.

While the LPSC did not require a statewide TRM during the Quick Start phase, Frontier has collaboratively worked with Cleco, SWEPCO, and their evaluation, measurement, and verification (EM&V) contractor, ADM Energy, since 2017 to create and actively maintain a repository of deemed

savings calculations and documentation protocols based on the Arkansas TRM and adapted for Louisiana climate zones, where appropriate. Frontier continues to improve and adapt these deemed savings and add new measures at the utilities' request. Most recently, in 2023, Frontier updated all eligible measures to comply with Arkansas TRM versions 7.0, 9.1, or other approved statewide TRM, as directed by ADM Energy. This effort ensures claimed savings are in line with updated baselines and will more accurately reflect actual projected demand reduction and energy savings from every measure installed and tracked by the utilities.

Frontier implements these savings methodologies for our Louisiana clients in our Deemed Savings Engine (DSE), an online tool that connects with P3 or other utility program tracking databases to ensure claimed savings are calculated according to approved protocols. We also produce Excel calculation tools that SWEPCO and Cleco use to calculate savings for commercial lighting and HVAC projects.

These deemed savings algorithms and our DSE could very efficiently and quickly be updated to incorporate other utility service areas to ensure savings per measure across the entire state are consistent, transparent, and accurate. Our team strongly believes adapting Frontier's existing Louisiana-specific deemed savings and documentation protocols into an official statewide TRM and updating our DSE, is the most cost-optimized approach the LPSC can take to seamlessly transition the programs to a statewide administrative model and ensure programs offered and measures installed are accurately recorded and tracked across the board (for both electric and gas programs).

Frontier's History with Statewide TRMs

Our team has a long history developing deemed savings for electric and gas utilities. Working on behalf of the Texas investor-owned utilities (IOUs), we assisted with deemed savings development and regulatory filings dating back to 1999. In 2013, Frontier worked with the Public Utility Commission of Texas and their statewide evaluation contractor to create the very first Texas TRM. On behalf of the Texas IOUs, Frontier continues to lead annual deemed savings development activities in support of every annual TX TRM update.

From 2011-2016, Frontier also served a key role working as a sub-contractor to the Arkansas Public Service Commission and Independent Evaluation Monitor to assist with deemed savings development for the original deemed savings that would eventually form Version 1.0 of the Arkansas TRM. Frontier's work as Technical Manager for the Arkansas EM&V Collaborative included presenting and defending industry best practice engineering methodologies as necessary to ensure the TRM was accurate and up to date, as well as continually refining methodologies and adding high-impact measures to capture savings from new technologies. This experience proved very useful when modifying the Arkansas TRM for use in Louisiana climate zones.

To date, Frontier remains actively involved in deemed savings development and TRM updates in Louisiana, Texas, California, Illinois, New Mexico, New York, and Oklahoma.

Additionally, Frontier has developed gas savings measures for the Arkansas, Illinois, and New Mexico TRMs. While Oklahoma and Texas do not currently require a statewide gas TRM, our team has worked with multiple gas utilities to develop deemed savings methodologies for both states. Frontier has also proposed and outlined the potential for a statewide Texas gas TRM.

In addition, Frontier currently implements an appliance rebate program for Atmos Mid-Tex, and consults on Atmos Mid-Tex's low-income weatherization program, Keeping the Warmth. For both programs, Frontier developed savings models based on our work with gas TRMs in nearby states, defining data and documentation collection requirements, and identifying, applying, and verifying savings for every incentivized measure.

EXPERIENCE IN PRODUCING PROGRAM PLANS AND ANNUAL REPORTS

In Louisiana, our team currently assists with multiple aspects of the utility's program planning process and annual reports, including assistance with the Standardized Annual Reporting Workbooks. Our team provides back-end support to analyze past year program performance and help project savings based on the next year's portfolio budget. Additionally, we assist with segments of the annual reporting process, which involves reviewing and reconciling data between our P3 data and the utilities' EM&V contractor to ensure final reported savings are accurate and all required program documentation has been vetted. Specific to program planning, the Frontier team conducts a deep-dive analysis of Cleco's program performance and helps develop an annual overarching projected portfolio, estimating savings, participation, and cost-effectiveness based on the utility's budget and internal goals.

In Louisiana, our team currently assists with multiple aspects of the utility's program planning process and annual reports, including assistance with the Standardized Annual Reporting Workbooks.

Additionally, our Austin consulting staff assists the majority of the Texas IOUs to develop and submit their annual Energy Efficiency Plan & Reports (EEPRs) and Energy Efficiency Cost Recovery Factors (EECRFs), including calculating annual performance bonuses and acting as an intermediary between the utilities, Public Utility Commission of Texas (PUCT), and its EM&V contractor, as needed, to ensure all programs are reported in line with regulatory requirements.

Beyond annual program plans and reports, the Frontier team has decades of experience developing other kinds of energy efficiency plans, including implementation and evaluation guides. For example, our general approach to an overarching Implementation Plan sets out a high-level vision of the program goals and components, roles of participants, and lists other program documents, which typically include an Operations Manual, a Marketing and Outreach Plan, a Program Participation Guide, and a Quality Assurance/Quality Control Plan. Program plans and governance documents are reviewed and updated annually, or as needed, to capture growth and modifications as programs mature.

Frontier staff are well-versed in program planning from various aspects of the energy efficiency program process, and we can successfully collaborate with the LPSC and stakeholders to develop planning and reporting procedures beneficial to all stakeholders that meet all requirements outlined in the Phase II EE Rule.

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

Frontier currently has an office in Houston, TX, and staff located in Shreveport, LA. Frontier will fulfill the requirement for two offices in Louisiana in the event of an award as Program Administrator. Frontier brings experience opening new offices, hiring staff, and setting up call centers to ensure local presence for programs.

Frontier has 180 employees in or affiliated with offices in Austin, Texas; Davis, Oakland, Pleasanton, and Sacramento, California; Chanhassen, Minnesota; and Cazenovia, New York. Staff are not siloed but often work collaboratively to benefit clients by providing services and expertise cost-effectively throughout the country. This capability, combined with current resources in place in Louisiana, would enable Frontier to assume Program Administrator startup activities concurrently with adding new offices, so program implementation is not delayed.

EXPERIENCE FACILITATING SMOOTH TRANSITIONS OF UTILITY LEAD EE PROGRAMS TO THIRD-PARTY ADMINISTERED ONES

In 2017, Frontier assisted in transitioning Cleco's entire portfolio of energy efficiency programs from a third-party implementer to the utility-led approach currently being used for the Phase I Quick Start programs. Frontier coordinated with both Cleco and third-party implementation staff to plan out the transition and configure the P3 tracking system to support the new programs. Frontier worked with the third-party implementation staff to obtain and format historical program data to import into P3. Frontier worked with Cleco staff to design program workflows, develop reports, and configure measures to meet their specific needs. Frontier also created training materials to assist in the transition.

Frontier assisted in transitioning Cleco's entire portfolio of energy efficiency programs from a third-party implementer to the utility-led approach currently being used for the Phase I Quick Start programs.

At the conclusion of the transition period, Frontier's role shifted to managing the tracking system and providing consulting and engineering support.

We believe this experience provides us with a unique understanding of what this utility-led program design to statewide third-party model transition will entail. We are excited at the opportunity to apply our experience and existing tools (P3 system, Deemed Savings Engine, our team's institutional knowledge, and other attributes and tools) toward the development of a successful, efficient statewide program roll-out.

Two other examples of our ability to transition program administration designs are highlighted below.

New Jersey's Clean Energy Programs

Members of Frontier's team were involved in the transition of the state of New Jersey's Clean Energy Programs from direct utility implementation to a statewide implementation model and team from 2008–2012. During the transition period, members of Frontier's team (then working for CSG Services) planned and coordinated the work involved in a myriad of programs, working with different implementers, contractors, and customers to define, refine, and transition program offerings, market the programs statewide, and communicate updates to all stakeholders. These included residential and commercial program offerings as well as extensive small- and large-scale solar programs. The New Jersey Clean Energy Programs are still operating under statewide management, see www.njcleanenergy.com.

Xcel Texas Residential HVAC and Commercial Load Management Programs

Frontier has assisted Xcel Energy's Texas energy efficiency group with implementation of their Texas commercial load management program for nearly a decade. At first, Frontier helped set up the program, created all documentation and participation contracts, and provided Xcel with its eCurtail software. eCurtail is part of Frontier's Enertrek suite of software tools and enables participants to sign up for the program online, calculates and displays each participant's response to each called event, and summarizes seasonal history for incentive payment purposes. Frontier's role has since grown to include outreach to new participants, proposing and documenting annual program changes, holding an annual kickoff meeting, and communicating to participants throughout the program year.

Xcel Texas also had been implementing a residential HVAC program with limited success, and in 2023 contracted with Frontier to take over management and implementation of the program. Frontier hired a new employee and began marketing the program to HVAC contractors throughout

the region, attracting several large retrofit projects and several contractors to the program. Our implementation team is continuing to grow the program in 2024.

CONFLICTS OF INTEREST

Frontier has no conflicts of interest that would limit our ability to provide the requested services. In the event that a conflict should arise, Frontier will inform LPSC and recommend a strategy to mitigate the conflict, which could include changes in procedures, scope, and/or personnel while also avoiding any disruption to services.

APPENDIX A: RESUMES

- Jean Krausse, Vice President
- Amy Martin, Vice President
- Derek Neumann, Senior Engineer/Senior Tech Solutions Associate
- Karl Dyke, Program Manager
- Lucy Zhu, Program Manager/Statistical Analyst
- Alex Barney, Engineer
- Chris Stanaland, Program Coordinator
- Steve Wiese, Director of Implementation
- James Hoffner, Senior Program Coordinator
- Alex Rivera, Senior Program Manager/Technology Product Manager
- Tracie Cooper, Program Manager/EnerTrek Analyst
- Ron Young, Senior Program Manager/Lead Software Developer

Jean O'Brien Krausse

Vice President



PROFILE

Jean O'Brien Krausse is an industry expert in energy efficiency with 30 years' experience in project leadership, program design, and implementation, as well as a decade of experience in software project management. She is the lead executive of Frontier Energy's Demand Side Management (DSM) division, with oversight for staff in Texas and California, and the Austin-based EnerTrek software division. Jean is a skilled communicator and mentor to staff and trusted executive manager of Frontier client accounts.

In her role as head of the DSM division, Jean oversees Frontier's utility energy efficiency programs across the country. Jean has contributed extensively to management and oversight of Frontier utility client DSM programs, including offerings for residential single family, multifamily, low income, and commercial customers. She works closely with program managers and clients to ensure adequate resources, and coordinates hiring and deployment of back office and onsite field inspection personnel. She also provides support to clients for development of future program offerings.

In her role with the EnerTrek software division, she provides oversight for large-scale, multi-year software development projects including ComEd's data tracking system. She also manages the software developers, web designers, and helpdesk professionals responsible for Frontier's comprehensive web-based tools for utility efficiency program management. Her leadership and business acumen have been crucial to product development for Frontier's flagship software solution, the Program Portfolio Portal (P3[®]) and next-generation successor products. Jean oversees ongoing enhancements to EnerTrek systems and supports the EnerTrek client user group. She plays an essential role in business development and exploring new markets for the EnerTrek product line and has expanded the EnerTrek client base to currently include 31 utilities in 7 states.

EDUCATION/CERTIFICATIONS/TRAINING

Bachelor of Arts, Government, The University of Texas at Austin, Austin, TX

FRONTIER ENERGY EXPERIENCE

2009 to present

- Vice President of Frontier Energy's DSM division and EnerTrek® software team, including 45 staff in offices in Texas and California.
- Responsible for Frontier staff providing energy efficiency, renewable energy, and demand response program implementation; rebate processing and fulfillment; deemed savings development and Technical Reference Manual updates; onsite verification; third-party independent evaluation; and regulatory consulting.
- Oversight for utility programs and software projects in Texas, California, New Mexico, Oklahoma, Louisiana, Illinois, and Minnesota.
- Leads the Austin-based software development team including software engineers, developers, web user interface designers, and helpdesk professionals.
- Manages key client accounts for DSM and EnerTrek software divisions.
- Program development and oversight for a variety of utility energy efficiency rebate programs and utility weatherization programs in several states.
- Contributed extensively to the product development process that brought the P3 system to market and led the effort to bring P3 and Frontier's Deemed Savings Engine (DSE) tool to utility clients across Texas and in Louisiana.
- Project manager for the ComEd data tracking system and Austin Energy Green Building database developed by Frontier.
- Liaison to program management and the quality assurance/quality control team.
- Serves on the Frontier executive leadership team and provides oversight for Frontier's Austin office operations.
- Leverages over 30 years of experience in energy efficiency program design and implementation across the United States.

PRIOR EXPERIENCE

Vice President, Meridian Communities (1996 – 2008)

- Responsible for company operations and financials. Meridian Communities designed and built energy efficient homes in Austin and San Antonio and was involved in various land development projects.

Executive Vice President, Planergy Inc. (1981 – 1994)

- Responsible for oversight of company organization and client relations and marketing.
- Managed numerous utility energy audit programs in various states.
- Established, managed, and hired and trained staff for 10 field offices across the U.S.
- Provided project oversight and served as client liaison.
- Coordinated more than 200 Texas Energy Conversation Workshop Seminars.
- Provided energy efficiency training to state and local government officials.

Amy Martin

Vice President



PROFILE

Amy Martin is a utility regulatory policy professional with a thorough understanding of energy efficiency program evaluation, measurement, and verification (EM&V) and cost-effectiveness. She brings a decade of experience calculating energy efficiency program and portfolio savings impacts and assessing the costs and benefits of various Demand Side Management (DSM) measures. She has developed very close relationships with staff at many of the utilities in Texas and in neighboring states. At Frontier, Amy provides leadership and oversight for consulting and engineering staff for projects including multi-year EM&V projects – many involving the use of AMI data.

EDUCATION/CERTIFICATIONS/TRAINING

Master of Public Affairs, LBJ School of Public Affairs, The University of Texas at Austin
 Bachelor of Science in Biology, The University of Texas at Austin – emphasis in Ecology/Evolution/Behavior

FRONTIER ENERGY EXPERIENCE

2008 to present

EM&V of Save for Tomorrow Energy Plan (STEP) Energy Efficiency Portfolios, CPS Energy, 2015 to present

- CPS Energy hired Frontier to perform an impact evaluation on utility and vendor energy efficiency program offerings and track program performance towards their 2021 STEP non-coincident peak kW goal. This evaluation also includes a minor focus on select process evaluation tasks. Amy provides oversight for the engineers and consultants performing this project, with responsibility for project team resources and quality assurance.

EM&V of CPS Energy Vendor Energy Efficiency and Demand Response Program Implementation, CPS Energy, 2017 to present

- This project is similar to the CPS Energy STEP evaluation with a greater focus on tracking vendor performance against contractual obligations and overall CPS Energy customer satisfaction.

EM&V of High Performance New Construction and Residential New Construction Energy Efficiency Portfolios, Independent Electricity System Operator (IESO), formerly Ontario Power Authority (OPA), 2013 – 2016

- Amy provided oversight for the engineers and consultants performing this project, with responsibility for project team resources and quality assurance.

Statewide Deemed Savings Development for Texas Technical Reference Manual (TRM), Public Utility Commission of Texas (PUCT) and Electric Utility Marketing Managers of Texas (EUMMOT), 2014 to present

- Amy provides oversight for the consultants and engineers performing this work, and she also works directly with the Texas utility clients, evaluation staff, regulatory commission staff, and other stakeholders related to the development and implementation of approved deemed savings methodologies. Amy serves as stakeholder consensus-builder for statewide collaborative efforts related to Texas TRM proposals and presents results at EUMMOT planning meetings and at public meetings for the PUCT Energy Efficiency Implementation Project (EEIP).

Pre-TRM Statewide Deemed Savings Development for Texas Investor-Owned Utilities, PUCT and EUMMOT, 2009 – 2014

- Amy served as stakeholder consensus-builder for statewide collaborative efforts related to deemed savings proposals and presented results at EUMMOT planning meetings and at public meetings for the PUCT.

Energy Efficiency Program Design & Plan Filing, El Paso Electric New Mexico (EPE NM), 2009 to present

- Amy leads the development of EPE NM's energy efficiency portfolio planning analysis, serving as client liaison and providing regulatory assistance, cost-effectiveness analysis, and oversight for engineers and consultants quantifying savings estimates for new and existing energy efficiency measures. Amy has assisted EPE with plan development and filings since 2009. She filed direct testimony for the 2017 plan filing and is currently working on the 2019 – 2021 plan with the EPE team.

Statewide Deemed Savings Development for Arkansas TRM, Arkansas Public Service Commission (PSC) and Arkansas Parties Working Collaboratively (PWC), 2011 – 2016

- Amy provided oversight for the project team, with responsibility for team resources and quality assurance.

General Activities & Other Experience

- Provide oversight on a variety of projects, including cost-effectiveness analyses, EM&V activities, and energy and water efficiency program planning and design.
- Support all ten investor-owned electric utilities in Texas, analyzing potential impacts of legislation, assisting with regulatory filings, coordinating meetings and workshops, and collaborating with PUCT and the statewide EM&V evaluator. Responsible for ongoing enhancements to Frontier's Cost-Effectiveness Calculator tool and experienced in using DSManager.
- Previously led a five-year bi-annual evaluation estimating the energy savings and demand reduction resulting from an educational behavioral program designed to encourage conservation at a grassroots level. Other notable contributions include assisting in the preparation and development of the Texas Renewable Energy Resource Assessment statewide potential study sponsored by SECO and evaluating the EUMMOT statewide CFL program.

PRIOR EXPERIENCE

Enforcement Coordinator, Texas Commission on Environmental Quality (TCEQ), 2006 – 2007

- Coordinated efforts to expeditiously settle enforcement actions against environmental violators. Researched violations, calculated penalty payments in line with the TCEQ's policies, and drafted proposed agreements. Facilitated the negotiation process to resolve enforcement actions and ensure violators returned to compliance.

Technical Resource Specialist, Electric Power Research Institute, 2005 – 2006

- Provided technical assistance regarding the Institute's research and development projects supporting member utility companies. Responded to requests for research and membership information from international and domestic organizations and facilitated the process to identify and resolve access issues. Created and implemented quarterly customer satisfaction surveys and analyzed response data.

SELECTED ACTIVITIES & AFFILIATIONS

- Texas Water Foundation Young Professionals - Leader, "Water, Texas" short film contest fundraiser.
- Volunteer, Keep Austin Fed.

PUBLICATIONS & PRESENTATIONS

1. What's your kW? Defining Peak Demand in Texas. With Lark Lee. Conference Proceedings: ACEEE 2015 National Conference on Energy Efficiency as a Resource. September 2015.
2. Co-author of Energy Efficiency Programs in a Restructured Market: The Texas Framework. The Electricity Journal, Volume 28, Issue 2, March 2015.
3. EPA's Clean Power Plan: Energy Efficiency Opportunities for the Water Sector. Conference Proceedings: Texas Water Conference, April 2015.
4. How Do Prepay Electricity Programs Impact Consumer Behavior? With Jay Zarnikau, Greg Landreth, and Lucy Zhu. White paper for Distributed Energy Financial Group (DEFG) Prepay Energy Working Group. January 2014.

Derek Neumann

Senior Engineer/Senior Technology Solutions Associate



PROFILE

Derek Neumann is a Certified Energy Manager (CEM) with over 13 years of experience in the energy industry with particular expertise in leading deemed savings development and evaluation, measurement, and verification (EM&V) projects. As Senior Engineer, Derek provides leadership for development of deemed savings values and Technical Reference Manuals (TRMs) for utility program EM&V. Working closely with utility program management, implementation vendors, regulatory commission staff, statewide evaluators, and other stakeholders, he provides engineering review and analysis for energy efficiency measure savings development, program design, incentive rate structures, EM&V, and cost-effectiveness.

Derek manages the implementation of energy efficiency rebate programs for residential and commercial market sectors, serving as client/evaluator liaison and account manager responsible for directing rebate processing activities. Through his evaluation and implementation-related activities, Derek also conducts desk reviews and onsite inspections of energy efficient equipment installations to validate program savings claims.

Derek is a skilled communicator with proven ability to mediate technical discussions for multi-stakeholder teams. He is highly accessible to clients and well-versed in presenting engineering methods and analysis to widely varying audiences.

EDUCATION/CERTIFICATIONS/PROFESSIONAL ASSOCIATIONS

B.S., Mechanical Engineering, The University of Texas at Austin, Austin, TX

Certification in Business Foundations, The University of Texas at Austin, Austin, TX

Certified Energy Manager

AESP (Association of Energy Services Professionals); AEE (Association of Energy Engineers)

ASME (American Society of Mechanical Engineers)

PROJECT EXPERIENCE

Deemed Savings Development

Statewide Deemed Savings Development for Louisiana IOUs, American Electric Power Southwestern Electric Power Company (AEP SWEPCO) and Cleco Corporation (Cleco), 2017 to present

- Derek serves as project and engineering lead in developing and compiling deemed savings methodologies and guidance for utility and vendor reference in implementing EE measures. He also serves as a primary liaison between utility program management, evaluation staff, and other stakeholders related to the development and implementation of approved deemed savings methodologies.

Statewide Deemed Savings Development for Texas TRM, Electric Utility Marketing Managers of Texas (EUMMOT) and Public Utility Commission of Texas (PUCT), 2013 to present.

- Derek serves as project and engineering lead in developing and compiling residential and commercial deemed savings methodologies and guidance for utility and vendor reference in implementing energy efficiency (EE), renewable energy (RE), and demand response (DR) measures. He also serves as a primary liaison between utility program management, evaluation staff, regulatory commission staff, and other stakeholders related to the development and implementation of approved deemed savings methodologies.

Statewide Deemed Savings Development for Arkansas TRM, Arkansas Public Service Commission (AR PSC) and Arkansas Parties Working Collaboratively (PWC), 2011 – 2016

- Derek served as project and engineering lead in developing and compiling deemed savings methodologies and guidance for utility and vendor reference in implementing EE measures on behalf of the AR Independent Evaluation Monitor (IEM).

Program Design & Implementation

Program Design and Implementation of Commercial Rebate Programs, AEP SWEPCO Texas, 2023 to present

- Derek serves as the program and engineering lead for this project, including oversight on program design, customer and contractor outreach, implementation, savings verification, data integrity, QA/QC, cost-effectiveness, and reporting. He is also responsible for supporting on-site verification and inspections.

Program Design of Residential and Commercial Rebate Programs, Cleco, 2018 to present

- Derek serves as the engineering lead for this project, including oversight on program design, savings verification, and cost-effectiveness.

Program Design and Implementation of New Mexico Residential Comprehensive and Small Commercial Comprehensive Rebate Programs, EPE, 2009 to present

- Derek serves as the program and engineering lead for this project, including oversight on program design, customer and contractor outreach, implementation, savings verification, data integrity, QA/QC, cost-effectiveness, and reporting.

Calculator Development

Development and maintenance of Lighting Survey Form (LSF) Commercial Lighting Calculator, Multiple Electric Utilities Spanning Several States Including Texas, New Mexico, and Louisiana, 2011 to present

- Derek is the project and engineering lead responsible for the development and maintenance of this Excel-based calculator used to assist with implementation of commercial lighting and lighting controls projects for various utilities across multiple states. His primary responsibilities include updating the calculator for compliance with TRM savings methodologies, user interface enhancements, utility/vendor training, and helpdesk support.

Development and maintenance of Air Conditioning Evaluator (ACE) Commercial HVAC Calculator, Multiple Electric Utilities Spanning Texas and Louisiana, 2013 to present

- Derek is the project and engineering lead responsible for the development and maintenance of this Excel-based calculator used to assist with implementation of commercial HVAC projects for various utilities across multiple states. His primary responsibilities include updating the calculator for compliance with TRM savings methodologies, user interface enhancements, utility/vendor training, and helpdesk support.

Development and maintenance of Cool Roof Calculator (CRC), Multiple electric utilities spanning Texas and Louisiana, 2013 to present

- Derek is the project and engineering lead responsible for the development and maintenance of this Excel-based calculator used to assist with implementation of commercial cool roof projects for various utilities across multiple states. His primary responsibilities include updating the calculator for compliance with TRM savings methodologies, user interface enhancements, utility/vendor training, and helpdesk support.

Karl Dyke

Program Manager



PROFILE

Karl Dyke graduated with a Master's degree in Economics from Texas A&M University, where his core studies focused on financial econometrics, statistics, forecasting, emerging technologies, and philosophy. He has experience analyzing commodity markets and complex economic systems and utilizes his enthusiasm for analytics to assist with cost-efficiency calculations and deemed savings development. Karl's technical skillset includes fluency in the R, Python, and SAS statistical programming languages, various Business Intelligence tools, and advanced work in Microsoft Excel. He uses these skills to accomplish a wide variety of analytical tasks ranging from data engineering and visualization to providing inference based on statistics and economic theory.

EDUCATION/CERTIFICATIONS/TRAINING

M.S., Economics, Texas A&M University (Concentration in Financial Econometrics)

B.S., Agricultural Economics, Texas A&M University (Concentration in Rural Entrepreneurship and Minor in Philosophy)

FRONTIER ENERGY EXPERIENCE

April 2019 to present

- For multiple Texas, Louisiana, and New Mexico clients, assessed energy efficiency plans' cost-effectiveness and provided forecasted estimates of future energy/demand savings, modeled incentive payments, and various summary ratios.
- Yearly, summarized and standardized multiple years' worth of results from each Investor-Owned Utility and continued to provide the Electric Utility Marketing Managers of Texas' (EUMMOT) with their yearly report.
- Assisted with general ad-hoc analysis of various utilities' incentive rate structures.
- Successfully coded and investigated a non-linear programming optimization function which maximized bonus and reduced lost revenue for a Texas utility.
- Assisted with the data engineering for a large-scale "consumption analysis," which evaluated the effectiveness of residential energy efficiency efforts for the City of San Antonio, Texas, using highly granular electricity load data from AMI meters.

- Yearly, assisted with the development of energy efficiency and demand response deemed savings and engineering algorithms for Texas' Technical Reference Manual (TRM).
- Worked with the Texas Steel Mill Coalition in analyzing the effect of a shift in the Operating Reserve Demand Curve (ORDC) and assisted with research on how the Real-Time Co-optimization (RTC) effort by ERCOT will affect the energy efficiency landscape.

PRIOR EXPERIENCE

Independent Contractor, Crude Oil Market, February 2019 – August 2019

- Computed econometric time series models (e.g., ARIMA) using Python 3.7 in a command-line environment.
- Converted time series to supervised learning input for new forecasting approaches based on machine learning techniques.
- Incorporated qualitative insight garnered from market environment into forecasting methods for extra explanatory power.

Graduate Teaching Assistant, Department of Agricultural Economics, College Station, TX, August 2016 – May 2017

- Instructed 40-155 students on the intricacies involved in the formulation of a small business plan and encouraged the development of innovative solutions to counter analytical, organizational, and intuitive problems faced in such endeavors.
- Collaborated with various mentors on the improvement of small business feasibility analysis.
- Evaluated students' performance in a capstone course, assigned grades, and provided feedback.

Trade & Business Development Inter, Texas Department of Agriculture, Austin, TX, June 2015 – August 2015

- Consolidated agricultural market data fluctuations into a standardized format to inform 6,000+ industry professionals of the daily market environment.
- Investigated new techniques for the development of a local market news price reporting methodology.
- Instructed a new full-time employee on the techniques necessary for success in presumed position.

Lucy Zhu

Program Manager/Statistical Analyst



PROFILE

Since joining Frontier in 2013, Lucy Zhu has excelled in organizing, analyzing, and interpreting complex data, especially large-scale interval recorded data. She uses statistical models to analyze the impact of various energy efficiency and pricing programs on energy usage; designs experiments to analyze the impacts of various pricing programs or technologies on energy or water consumption behavior; and provides assistance on projects related to energy efficiency, electric demand response, and energy economics.

Lucy is adept in statistics programming software such as R, SAS, SQL, and STATA. She is familiar with various statistical methods such as ANOVA, logistic regression, panel data regression analysis, time series, sample selection, principal component analysis (PCA), structural equation modeling (SEM), Bayes' theorem and data mining. Lucy is also experienced in experimental design such as sample determination and randomized controlled trial (RCT).

EDUCATION/CERTIFICATIONS/TRAINING

M.S., Statistics, The University of Texas at Austin

B.A., Economics, Fudan University, Shanghai, China

Currently: Part Time Graduate Student in Power Electronics and Power Systems Track,

Electrical and Computer Engineering Department, The University of Texas at Austin

Society of Actuaries Exam P (Probability) – Passed with highest possible score

FRONTIER ENERGY EXPERIENCE

Evaluation, Measurement, and Verification (EM&V) of Save for Tomorrow Energy Plan (STEP)

Demand Response Portfolios, CPS Energy, 2015 to present

- Lead EM&V analysis on demand response programs portfolio.
 - Perform savings analysis on demand response events for residential EV managed charging program, residential smart thermostats, bring-your-own thermostats (BYOT), behavioral demand response, and commercial load management using statistical models and AMI data.
- Perform savings analysis on residential EV rebate program starting 2021.
- Communicate with clients on their needs and saving goals.

- Develop workplans for demand response program evaluations including sample size determination and stratification, experimental design with current available resources, and timeline planning.
- Conduct benefit cost analysis on demand response programs and provide recommendations for clients.

AEP Texas Electric Vehicle Charger Research & Development Project, 2021 to present

- Market research, sample design, and EM&V design
 - Perform comprehensive market research for EVs within AEP Texas area.
 - Design stratified representative EV samples based on budget, geographical distribution, and EV type.
 - Help design data monitoring approaches and evaluation methodologies based on available data and timeframe.
- Data monitoring and analysis
 - Periodically monitoring participants' charging behavior based on high definition interval charging data.
 - Make behavior adjustment recommendations based on collected data.
 - Statistical analysis to identify or quantify possible savings for level 2 vs level 1 charging.

Residential and Small Commercial Demand Response Pilot Program, El Paso Electric Company, 2017 – 2019

- Led estimating of deemed savings including sample size determination and stratification, data collection and cleaning, interval recorded data analysis with regression.

Identification of Peak Period Impacts for Texas Technical Reference Manual (TRM), Public Utility Commission of Texas (PUCT) and Electric Utility Marketing Managers of Texas (EUMMOT), 2013 – 2016

- Helped identify peak hours for different TRM zones using logistic regression. The peak hours identified served as one of the base assumptions for various energy efficiency programs deemed savings estimate.

Analyze Load Reduction Impacts for Wind and Peak Time Pricing - A DOE-funded Pecan Street project, 2013 – 2015

- Used panel data analysis and difference-in-difference (DID) model to quantify participants' savings with low pricing during wind period (nighttime) and high pricing during summer peak afternoons.

ERCOT Retail Demand Response and Dynamic Pricing Project, 2013 – 2014

- Helped quantify ERCOT system-wide savings for price spike period using regression analysis and baseline analysis.

Alex Barney

Engineer



PROFILE

Alex Barney's technical expertise and coordination skills have been employed for multiple clients since he joined Frontier Energy in June 2023. He assumed key responsibilities revising the Texas Technical Reference Manual (TRM), working with EPE's residential rebate programs, creating the Louisiana TRM, and testing various energy savings measures in the Deemed Savings Engine (DSE). Alex has been instrumental in streamlining the creation of the Louisiana TRM and expediting the approval process for EPE's residential rebate program.

EDUCATION/CERTIFICATIONS/TRAINING

B.S., Mechanical Engineering, Montana State University

FRONTIER ENERGY EXPERIENCE

June 2023 to present

EPE Residential Rebate Program, June 2023 to present

- Key responsibilities include approving/denying submittals, creating and distributing invoices for each batch of rebates, and collaborating with local contractors in Las Cruces to obtain necessary specifications and authorize rebates.

Development of the Louisiana TRM, July 2023 to present

- Started creating the TRM for Louisiana using various existing TRMs and adapting them to Louisiana's climate zones by calculating adjustment factors for the deemed savings.

DSE Testing, June 2023 to present

- Tested a variety of residential and commercial measures in the DSE using crafted energy savings calculators and comparing them to existing deemed savings tables.

PRIOR EXPERIENCE

Forensic Engineering Intern, Denver, CO, June – August 2022

- Spearheaded industrial kitchen piping failure investigation by examining failed piping network to assess geotechnical engineering and building code compliance.
- Re-designed cantilever beams for a large apartment complex through allowable stress design to bring structures up to the 2021 International Building Code.

Christopher Stanaland

Program Coordinator



PROFILE

Christopher (Chris) Stanaland acts as Frontier Energy's lead in coordinating El Paso Electric's Small Commercial program, which provides installation of various energy efficiency products, including but not limited to, lighting, HVAC, controls, window treatment, cool roof, and vending efficiency products for small commercial customers. This work involves detailed coordination with customers, contractors, and electric utility staff. Chris brings experience in customer service, engineering, and technical support from his previous roles, and is able to work and think flexibly and adapt to changing conditions.

EDUCATION/CERTIFICATIONS/TRAINING

Bachelor's Degree in Mechanical Engineering, New Mexico State University, Las Cruces, New Mexico

Associate Degree in Applied Science, El Paso Community College, El Paso, Texas

PROJECT EXPERIENCE

2018 to present

El Paso Electric Company Small Commercial Energy Efficiency Program

- Conduct outreach and marketing of the program and recruit qualifying small commercial properties to participate.
- Conduct on-site assessments prior to installation to identify qualifying energy efficiency measures and estimate energy savings using Frontier's online and Excel-based deemed savings calculation tools.
- Conduct on-site pre/post inspections to validate customer energy efficiency applications and ensure work is completed professionally and in conformance with program guidelines.
- Coordinate with electric utility administrative and inspection staff.
- Establish and track project milestones and timelines in Frontier's online and Excel-based project tracking tools.
- Provide reports on program activity and progress toward goals on a monthly basis.
- Maintain and improve client and participant satisfaction with programs.
- Assistance with other programs and support consulting/engineering team as needed.

PRIOR EXPERIENCE

Undergraduate Research Assistant, New Mexico State University, June 2017 – December 2017

- Provided research and technical support to develop and test USDA Farming Equipment and Undergraduate Research Projects through the University.
- Assisted higher engineering professionals with researching designs and gathering technical data (temperatures, thickness, size, geometric dimensioning, and tolerancing).
- Assisted graduate and undergraduate students in reviewing draft design drawings, product assemblies, equipment procedures, and diagrams based on requirements.
- Developed application of technical procedures using 3D modeling software.
- Reviewed designs and calculations for testing.
- Monitored compliance with specified ordinances, rules and regulations, given by USDA.

Laboratory Aide, Aqua Environmental Testing Lab (AETLAB), May 2013 – 2016

- Provided customer service by identifying solutions to their water needs.
- Set up and calibrated instruments to take water samples (i.e. pH probe) and provided logistical support of samples.
- Set up monitoring system operations.
- Modified test maintaining standard costs and cost reduction to comply with government regulations.
- Communicated with customers and maintained records by archiving and filing lab records for quality assurance.

Steven M. Wiese

Director of Implementation



PROFILE

Steve Wiese provides oversight for Frontier's implementation division and is responsible for client communication, account management, and achievement of energy efficiency and renewable energy program goals.

With over 20 years of experience related to distributed renewable energy, energy efficiency, and demand response, he brings a strong background in utility program design, implementation, and evaluation. Steve has broad experience with implementation and contractor outreach for energy efficiency, demand response, and renewable energy programs.

Energy efficiency programs currently directed by Steve include:

- Residential and Hard-to-Reach
- Targeted Low Income
- Multifamily New Construction
- Multifamily HVAC
- Multifamily Direct Install
- Small Business
- Residential Solar Photovoltaic
- Commercial Solar Photovoltaic
- Appliance Rebates

Steve is active in industry and community volunteer leadership roles and is the author of more than 40 energy-related reports and publications. He previously worked as a City Planner and has commended for managing multi-stakeholder teams to complete renewable energy and energy efficiency programs and projects for businesses, utilities, regulatory and other government agencies, consumers, and advocacy organizations.

EDUCATION/CERTIFICATIONS/TRAINING

Master of Business Administration, Graduate School of Business, The University of Texas at Austin

Master of Public Affairs, LBJ School of Public Affairs, The University of Texas at Austin

Bachelor of Arts in Biological Sciences and Public Policy, The University of California at Davis

FRONTIER ENERGY EXPERIENCE

2014 to present

- Responsible for the delivery of kW and kWh savings via implementation of 19 energy efficiency and renewable energy programs for 9 electric and gas utility clients in 4 states.
- Contribute to all phases of the program lifecycle, from design and implementation to evaluation. Provide expertise in support of program development, outreach, and regulatory affairs.
- Hire and manage all program implementation field and office staff.
- Steve's work at Clean Energy Associates and Frontier in jointly implementing solar/photovoltaic programs for Texas utilities since 2009 has resulted in the installation of over 20 MW of distributed solar energy capacity.

PRIOR EXPERIENCE

Owner, Founder, Principal Consultant, Clean Energy Associates, 2007 – 2014

- Managed multi-stakeholder teams to initiate, plan, execute, monitor, and complete renewable energy programs and projects for businesses, utilities, regulatory and other government agencies, consumers, and advocacy organizations.
- Provided expert knowledge leading to improved performance of distributed and utility-scale PV installations.
- Engaged extensively in solar business development in Texas, managed strategic partner relationships, promoted and supported sales channels, and routinely met and exceeded contracted goals.
- Leveraged deep experience in solar policy and regulatory affairs, power purchase agreements, leases, and renewable energy credit trading.

PROFESSIONAL AFFILIATIONS & ACTIVITIES

- Texas Property Assessed Clean Energy (PACE) Implementation Group, Co-Chair (with Senator Kip Averitt, 8/2013 – present) of the Program Design Working Group
- Austin Local Solar Advisory Committee, Chair, May – November 2012. Chaired (elected) 20-person committee appointed by Austin City Council and achieved a unanimous recommendation on a final Strategic Plan for Local Solar in Austin through 2020.
- Texas Renewable Energy Industries Association (TREIA) – President (elected) of the Board of Directors (February 2010 – January 2013). Member (elected) of the Board 2009 – 2011. Co-chair of solar and distributed generation committee 2007 – 2009. Member since 1996. Recipient of Volunteer of the Year award in 2008 and Member of the Year award in 2012.

James Hoffner

Senior Program Coordinator



PROFILE

James Hoffner comes to Frontier Energy with a background in Environmental Science and craft brewing. He is experienced in all aspects of managing small breweries and has been instrumental in streamlining processes and fostering energy efficiency and waste reduction practices. At Frontier, he has put this knowledge to work supporting CenterPoint Energy’s Texas Agencies in Action Program, AEP Texas’s Low Income and Solar Programs, and Texas-New Mexico Power’s Low Income and Residential and Hard-to-Reach Standard Offer programs.

EDUCATION/CERTIFICATIONS/TRAINING

B.A., Environmental Science, University of California at Santa Cruz

Emphasis in Renewable Energy

California/Denmark Renewable Energy, Exchange Student Program

Selected to participate in dual country exchange program specializing in renewable resources

BPI Certified – Infiltration and Ducting

FRONTIER ENERGY EXPERIENCE

August 2021 to present

CenterPoint Energy Agencies in Action Program

- Conduct site visits and confirm eligibility for single-family and multifamily customers.
- Input shared program platform with multiple data points regarding equipment and property.
- Inspect and validate contractor work for single-family low-income weatherization measures.

AEP Texas Low Income and Solar Programs

- Inspect residential solar arrays to verify program qualification and rebate eligibility.
- Update shared data tracking platform with customer and program information.
- Assist with low-income weatherization site visits and inspections.

Texas-New Mexico Low Income and Residential and Hard-to-Reach Standard Offer programs

- Coordinate with all customers to schedule and confirm site visits.
- Communicate regularly with program manager and team members on all aspect of program to ensure outstanding customer service and seamless program implementation.

PRIOR EXPERIENCE

Lead Cellarman, Zilker Brewing, Austin, TX, March 2019 – December 2021

- Head of cellar beer production. Developed new recipes to stay on the industry's cutting edge.
- Instituted efficient operation procedures to streamline technology and workflow.
- Significantly reduced water waste, improved hazardous chemical management, and increased energy awareness.

Professional Brewer and Operations Manager, Corralitos Brewing Company, Watsonville, CA, October 2014 – March 2018

- Critical partner in the development and startup of a highly successful brewing company.
- Created multiple award-winning beer recipes and techniques still used at the brewery.
- Responsible for production, barrel room management and wholesale accounts.

Manager and Owner, Seven Bridges Homebrew Supply & Brewery, Santa Cruz, CA, November 2010 – October 2014

- Founded Nano-Brewery, critical to the survival of the business.
- Responsible for employee management, bookkeeping, payroll, inventory, branding, and advertising.

Alex Rivera

Senior Program Manager/Technology Product Manager



PROFILE

Alex Rivera manages the product roadmap for EnerTrek tracking solutions development and the Deemed Savings Engine, Frontier’s proprietary web-based tool designed to integrate with external data sources and calculate energy and gas savings for measures as specified in technical documents including the Technical Reference Manuals (TRMs) in Texas, Arkansas, New Mexico, Minnesota, Illinois, Louisiana Deemed Savings, and the Oklahoma Deemed Savings Work Papers. He also manages P3 system administration and oversees program workflow design.

Alex is responsible for ongoing requirements gathering for maintenance, enhancements, and client interaction in Frontier’s EnerTrek software division. Alex supports Frontier’s web-based tracking systems for various utility program offerings, including Load Management, Low Income Weatherization, and HVAC Rebates.

Alex is experienced in creating requirement documents related to business processes within Frontier. He also performs analyses on incoming performance data from client programs. Alex came to Frontier with nearly a decade of experience in requirements gathering and documentation, project management, and client communication.

EDUCATION/CERTIFICATIONS/TRAINING

Master of Business Administration, Computer Information Systems, Texas State University, San Marcos, TX

B.A., Economics, Certificate of Business Foundations with Distinction, University of Texas, Austin, TX

Concentration: Computer Science, Austin Community College, Austin, TX

FRONTIER ENERGY EXPERIENCE

2013 to present

- Responsible for capture, analysis, and documentation of business requirements and translation into system functionality.
- Interact with client and project team members during all phase of system development.
- Coordinate with the development team and customers to ensure on-time project completion.

- Interact with engineering staff to ensure that savings calculations in EnerTrek[®] software division products match the calculations appearing in TRMs and other technical documents.
- Maintain updated applications documentation and training materials.
- Coordinate and lead end-user trainings.
- Assist in preparation of testing strategy and test plans; guide users acceptance testing.
- Support testing to ensure issues are identified and solution matches requirements.
- Contribute to marketing of software products.
- Perform help desk functions supporting all software users.
- Administer Deemed Savings Engine accessibility, performance, and accuracy.
- Assist in program implementation.
- Analyze program performance and measure-specific changes and communicate impact to stakeholders.
- Coordinate with consulting and engineering teams on business development opportunities.
- Serve as EnerTrek point of contact for coordination with evaluation, measurement, and verification teams.
- Assist in EnerTrek administrative review and implementation of protocols and procedures changes.

PRIOR EXPERIENCE

Social Media Specialist, Marketing, Venkel Ltd., 2011 – 2013

- Researched information and managed projects for web content including developing two environmental infographics which are showcased on the company website www.venkel.com.
- Created a monthly blog posted online and shared with more than 1600 engineers using Hubspot marketing software.
- With the Director of Marketing and Sales, contributed to an initiative to increase company's web presence utilizing search engine optimization (SEO) and web analytics.
- Digital marketing content creation and social media account management for enhancing company visibility.

Global Environmental Compliance Manager, Venkel Ltd., 2008 – 2013

- Positioned as the company-wide lead for environmental compliance and material composition requests.
- Implemented the use of BOMcheck environmental compliance software for the company, including account initialization. Responsibility for checking engineering reports and factory build lists against restricted substances lists to ensure compliance.

- Fulfilled customer requests by email for chemical makeup of components for international directives RoHS and REACH using IPC 1752-2 forms and proprietary forms from customers.
- Extensive use of Microsoft Excel to craft new environmental spreadsheets and complete material break down of parts.
- Maintained up-to-date knowledge of environmental directives such as RoHS and REACH using RSS feeds and Google Reader.
- Trained colleagues on new global environmental directives and methods for handling customer requests.

Senior Buyer, Venkel Ltd., 2005 – 2008

- Compiled Material Requirements Planning (MRP) reports weekly and ordered inventory based on reports on high-usage locations in the company using Crystal Reports.
- Ran inventory reports daily from the company database, contacted vendors and expedited orders that would not meet promised ship dates, and sourced parts with vendors to check for competitive pricing and delivery times.

Inventory Team Specialist, Logistics and Inventory Control, Venkel Ltd., 2004 – 2005

- Responsible for maintaining stock and performing ongoing cycle counts.
- Transferred stock within the company using SBT accounting software.
- Trained warehouse employees on shipping, receiving, and inventory procedures.

Tracie Cooper

Program Manager/EnerTrek Analyst



PROFILE

Tracie Cooper is responsible for managing and implementing help desk support for clients using Frontier Energy's EnerTrek® software division tracking systems. She brings expertise in the use of all features and functionality of Frontier's flagship software product, Program Portfolio Portal (P3®), offering responsive support for client programs including Residential, Commercial, Rebate, HVAC, HP New Homes, AC Distributor. Additionally, she provides EM&V support for all programs tracked in P3.

Her excellent communication skills provide value in her work developing and delivering training on EnerTrek software products. Tracie creates and supports multimedia training materials including user guides, webinars, audio and video recordings, and presentations. She delivers training for clients, implementers, and other end users both online and in-person at client facilities.

She is skilled in graphic design concepts and tools and provides updates to various websites hosted by Frontier. She also performs quality assurance testing and updates system documents.

EDUCATION/CERTIFICATIONS/TRAINING

CIW Web Foundations Associate Certification

Graphic Design and Motion Graphics, Austin Community College, Austin, Texas

FRONTIER ENERGY EXPERIENCE

2011 to present

- Responsible for capture, analysis, and documentation of business requirements and translation into system functionality.
- Interacts with client and project team members during all phases of system development.
- Identifies issues and recommends solutions.
- Provides help desk support to end-users of EnerTrek online systems.
- Develops training materials to assist clients in the use of online tracking tools.
- Conducts online and in-person training for clients and other end users.
- Assists in preparation of testing strategy and test plans; guides users acceptance testing.
- Supports testing efforts to verify system calculations and business rules.

- Assists development team leadership and management with creating and testing spreadsheet calculation tools for commercial and industrial lighting efficiency and demand savings helper tools.

PRIOR EXPERIENCE

Assistant Project Manager, Concept Services, Austin, TX (2002 – 2009)

- Responsible for all aspects of account management for equipment and services nationwide.
- Placed and tracked orders per franchise specifications, and provided direct contact with vendors regarding order status, delivery, and equipment troubleshooting.
- Coordinated equipment repairs and warranty service for franchise owners, managed implementation of new franchise owner specification manuals, and served as a liaison to the accounting department regarding invoice discrepancies and billing issues.

Revenue Support Specialist, SupportKids.com, Austin, TX (2001 – 2002)

- Served as the initial employer liaison for all child support wage-withholding cases, educated employers regarding wage-withholding compliance and UIFSA statutes.
- Assisted staff attorneys with employer non-compliance issues for entities nationwide.
- Responsible for the weekly reporting activity to the VP of Legal Operations.
- Maintained CUBS caseload ensuring accurate employment information for non-custodial parent and served as a liaison to government operations staff and enforcement officers regarding potential problems with postings and routing of wage-withholding payments.

Customer Relations, Works.com, Austin, TX (2000 – 2001)

- Provided internet support for the Works Purchasing Management Application (PMA) and Marketplace, educated customers regarding website navigation and diverse product line, and assisted customers with order status, financial transaction processing, billing inquiries, returns/exchanges, tracking shipments, and other post sales activities.
- Consistently met and exceeded sales goals by assisting in new business development and account management and focused on customer retention by promptly investigating and resolving customer issues.

Office Manager, Black Pearl Software, San Francisco, CA (2000)

- Organized and maintained office operations and procedures for software start-up.
- Handled all aspects of Accounts Payable, payroll and benefit administration, as well as planning and implementing office systems, layouts, and equipment procurement.
- Provided administrative and clerical services to CFO and principals.

Staff Accountant, TransNational Group, Boston, MA (1999 – 2000)

- Prepared monthly financial statements for all properties, maintained and compiled data for all assigned properties, coordinating monthly management statements, rent rolls, and leasing commissions on each building.
- Responsible for tenant related billing, including monthly rent invoices, sundries, rent steps, annual escalation calculation and reconciliation, as well as all aspects of Accounts Payable, including the processing of checks, vendor relations, bank reconciliation, and fixed assets.
- Assisted in preparing annual budgets, annual reports, and fiscal year-end close.
- Financial research for vendors and building manager.

Accounting Assistant, Animal Rescue League of Boston, Boston, MA (1996 – 1999)

- Prepared journal entries to assist the Controller with monthly financial statements, updated and maintained investment transactions through Quicken, and reconciled bank statements. Monitored and reviewed Accounts Payable processing of checks and vendor relations.
- Prepared and processed weekly payroll for 85+ employees.
- Implemented and maintained employee medical and dental benefits, union dues and 403(b) annuity plans, and assisted Controller and Human Resources department with implementation of Employee Benefit Statements, merit raises, and special projects.

Ron Young

Senior Program Manager/Lead Software Developer



PROFILE

Ron Young is an experienced lead software developer for Frontier’s EnerTrek product line. His technical expertise has been applied in the maintenance of existing software applications and in the planning and development of new software applications. Ron has assisted in the development of Frontier’s Program Portfolio Portal (P3) and Deemed Savings Engine (DSE) systems and continues to provide support for ongoing feature development, testing, and deployment.

Ron has provided critical software development leadership for the design and architecture of EnerTrek product offerings, such as Frontier’s solutions for automating Austin Energy efficiency program management. Ron’s responsibilities have included development of software web applications and web services with the .NET Framework and currently with the Microsoft Blazor technology.

Ron provides technical insight into business analytics, implementation of business analysis requirements into functional code, and decision making toward ensuring client program requirements are achieved in the P3 platform. He oversees and mentors junior developers, ensuring consistent standards in the work of others and progression in the skillsets of his co-workers.

EDUCATION/CERTIFICATIONS/TRAINING

Bachelor of Information Technology, Programming, American Intercontinental University, 2007

Microsoft Certified Application Developer, .NET

Microsoft Certified Professional

<http://www.microsoft.com/learning/mcp/transcripts>

Transcript ID: 737118

Access Code: 021804RKA

- Exam: 70-316, 70-320, 70-340, 70-175, 70-176

FRONTIER ENERGY EXPERIENCE

2010 to present

- Contribute to the design, development, and maintenance of Frontier’s suite of EnerTrek software products, providing oversight for various projects as Lead Developer.

- Extensive work with the Power Saver solution developed by Frontier for Austin Energy (AE), which automated the enforcement of program rules and requirements and thereby significantly reduced AE administrative costs.
- Contribute to Frontier's development and deployment of an EnerTrek solution for Commonwealth Edison, serving their 3.9 million retail customers.
- Provide ongoing support for the EnerTrek product line serving Texas utility client standard offer programs.

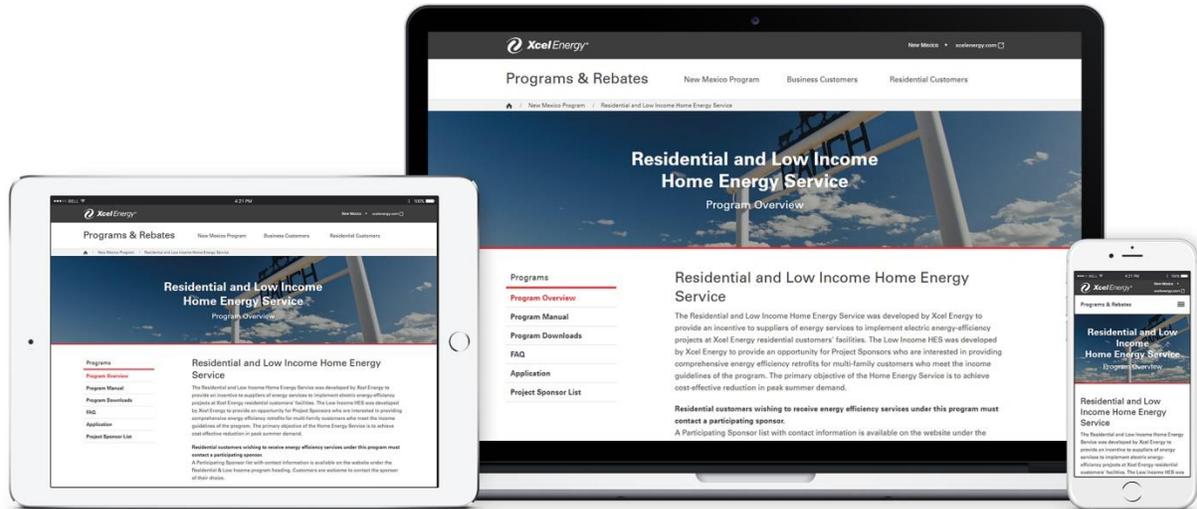
PRIOR EXPERIENCE

Cobb Information Systems, Inc., Austin, Texas (2007 – 2010)

- First Choice Power
 - Assisted in the development of ASP.NET web and service applications to enable processing of customer enrollment for electrical utility services.
 - Developed contract-first WCF services for internal file system processing and exposing functionality to third party channel partner applications.
 - Enabled unit testing of core components through dependency injection and implemented automated build and deployment.
- TXU Energy Online Business Portal
 - Assisted in the development of ASP.NET web application allowing customers to securely manage accounts and account statuses.
 - Used peer code review skills to identify multi-threaded race conditions and incorrect location of application and business logic and offered alternative solutions.
 - Provided timely resolution of issues during Phase I, and Support and Enhancements phase.
- Cobbsystems.com, and inside.cobbsystems.com
 - Utilized available administrative time to research and contribute technical article to internal WIKI.
 - Provided an XML solution for the maintenance, retrieval, and display of Cobb Information Systems Client Listings on public facing web application.
 - Researched Windows Communication Foundation, LINQ, Microsoft Enterprise Library, .NET Framework 3.5 features and provided sample code and recommended usage for CIS development.
 - Developed the Project Creator SharePoint Web Part allowing CIS development teams to easily create a new project for Issue Tracker management.

APPENDIX B: MARKETING MATERIALS

Marketing Materials Examples



Xcel Energy Efficiency Website built by Frontier (Launch version)

Xcel Energy Efficiency [Website](#) for New Mexico and Texas Programs: Frontier worked with Xcel Energy stakeholders to learn their needs and target audience for a new website they requested. Using design guidelines to standardize the client’s marketing brand approach, Frontier built the Xcel Energy Efficiency website using HTML5, CSS3, and jQuery. The website is responsive, consistent across all browsers, and user-friendly for tablet and mobile devices. Frontier ensures that the website adheres to search engine optimization (SEO) best practices and like all Frontier-developed websites, includes Google Analytics Tracking Code to provide real-time tracking and reporting on website traffic and performance. Frontier monitors website analytics, maintains and updates content, and periodically makes improvements to the site in collaboration with Xcel Energy.



Contractor Outreach Materials for CenterPoint Energy Low Income and Multifamily Programs

Frontier designed the large-format banner shown at left in accordance with CenterPoint Energy’s corporate branding guidelines, to advertise the Multifamily Market Transformation Program implemented by the Frontier team. The 32” x 83” banner was used at trade shows targeting multifamily housing developers and builders for the new construction elements of the program, as well as multifamily property owners for the retrofit direct install program element.

Multifamily Trade Ally Marketing and Outreach

For CenterPoint’s Multifamily Program initiatives, Frontier designed the double-sided half sheet size handout above for print and digital outreach to energy raters to encourage them to participate in the High Efficiency New Construction program element.

Multifamily Market Transformation Program
Incentives for New Construction

Two program elements Two ways to win

CenterPoint Energy offers two paths to earn incentives for multifamily new construction. Apply for both and maximize your incentive payments!

Water and Space Heating

Incentives for energy efficient non-electric equipment:

	Incentive per dwelling unit	
	Market Rate	Income Eligible
Individual Water Heaters	\$250	\$450
Boilers	\$150	\$250
Commercial Gas Heating Systems**	\$350-600	\$550-750

* Installed, load/unload energy savings

High Efficiency New Construction

Four types of incentives for market rate and income eligible:

Pay for performance**

\$0.02/kWh

Also take credit for gas boiler

Pay to sell*** incentives up to

\$405/dwelling unit

Rate incentive

\$20/dwelling unit

* Based on energy code minimum
** Equipment: AHU's, Ventilators, Appliances, Lighting, Windows, HVAC
*** Equipment: AHU's, Ventilators, Appliances, Lighting, Windows, HVAC

Process

CONTACT: Call or email program manager to determine eligibility.

APPLY: With program manager guidance, submit application and documentation via email.

INSTALL: Upon acceptance and award, project sponsor completes install on measures.

INSPECT: Inspect and, final approval, and incentive payment check from CenterPoint Energy.

CenterPoint Energy
Chris Lullier, Energy Efficiency Consultant
(713) 291-5899
chris.lullier@centerpointenergy.com

Water and Space Heating
Angel Moreno, Fuel Cell Energy, Inc.
(972) 992-8100
amoreno@fuelcellenergy.com

High Efficiency New Construction
Arlene Gault, Tempo, Inc.
(972) 992-1044
arlene.gault@tempoenergy.com

Frontier Energy implements this program with its contractor Tempo, Inc.

Multifamily Market Transformation Program
Incentives for New Construction

Program case studies

High Efficiency New Construction

“ Epcor Residential is committed to providing our residents with increased value, comfort, durability, and efficiency as demonstrated by NBS Green Certification. Through the Multifamily Program, CenterPoint Energy helped us to achieve this goal and supported us in doing so throughout the construction process. **”**

- Epcor Residential, developer

Community	The Pierpont 23770 Springwoods Village Pkwy, Spring, TX 77373
Size	304 units
Savings	kWh savings = 219,127 / Peak kW savings = 105.43
Incentives	Developer Incentive = \$34,400 / Rate Incentive = \$7,000
Project Measures	ENERGY STAR Appliances, ENERGY STAR Windows, High efficiency lighting, NBS Green Certification

Multifamily Water and Space Heating

“ CenterPoint Energy made it easy to meet our goals and provide an energy efficient solution to our residents that was also environmentally responsible. The Multifamily Program incentive was a cost-effective way to help us make this transition to gas. **”**

- RPII Contractors, construction manager

Community	Smart Living at Telephone Road 3802 Telephone Road Houston, TX 77025
Size	740 units
Savings	kWh savings - estimated at 49,310 kWh
Incentives	Developer Incentive = \$84,000
Project Measures	Natural gas tankless water heaters, Hydraulic heating

Multifamily Outreach to Market-Rate and Income Qualified Housing Developers

Frontier Energy created the 8” x 10” flyer above to promote the CenterPoint Multifamily High Efficiency New Construction and Water & Space Heating program elements. The flyer is accessible to various project sponsor types including builders, construction managers, contractors, and property developers. To develop this flyer, Frontier engaged with project sponsors from successfully-completed projects to include their case studies, photos, and testimonials to promote the program and encourage future participation on new projects.

7 Energy Efficiency Tips

1 Adjust your thermostat a little and save a lot.

- Lower your energy use for heating and cooling by keeping your home's temperature at 68° (in winter) and 78° (in summer) while you're away or sleeping.
- If possible, install a programmable or smart thermostat and save even more. Set an energy-saving temperature, avoid overriding it, and use the "hold" button to maintain a constant temperature while you're away.



2 Let your windows do the work.

- In cold weather, keep the shades open and let the sunlight heat your home. Close shades and drapes at night to insulate windows from cold air outside.
- To keep out the heat of the summer sun, close window shades and drapes in warm weather.



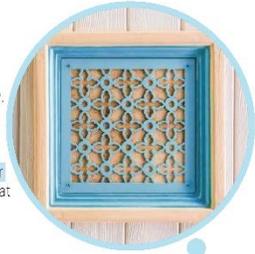
3 Be water-wise.

- With a new 2.0 or 1.5 gallon-per-minute showerhead, a 10 minute shower will use 15-20 gallons of water, saving 10-15 gallons over a typical bath. A new showerhead can also save energy used to heat water.
- Repair leaky faucets or alert your landlord to leaks. A leak that fills a coffee cup in 10 minutes can waste over 3,000 gallons of water a year.



4 Mind your air registers, returns, and radiators.

- Keep air registers clear of furniture so air can circulate freely.
- Be sure to change your air return filter every 1-3 months to keep your heating/cooling system running efficiently.
- If your home has radiators, place heat resistant reflectors or aluminum foil between the radiator and wall to reflect heat back into the room.



5 Select efficient appliances.

- If you're in the market for a new appliance, look for the ENERGY STAR® label and other information on product efficiency. Think of the appliance as having two price tags: one for the purchase price and another for the operating cost. Energy efficient appliances can lower your energy usage for as long as you have the appliance – and some appliances can last for 10-20 years.

6 Choose cold water for washing clothes.

- Water heating accounts for 90 percent of the energy your machine uses to wash clothes – only 10 percent goes to the motor. Switching to cold water for washing clothes can save energy and help your clothes last longer.
- Wash a full load of laundry rather than a partial load. Washing full loads can save more than 3,400 gallons of water each year.



7 Don't over-dry your laundry.

- If available, use your dryer's moisture sensor to automatically turn the machine off when clothes are dry. Remember to clean the lint trap before every load.
- Dry full loads or reduce drying time for partial loads.



Energy Efficiency Tips Leave-Behind Flyer for Residential Customers in CenterPoint Energy Low Income and Multifamily Programs

Frontier worked with CenterPoint to develop a leave-behind educational flyer including energy efficiency tips. For this project we created content that could apply to multiple markets and customer types (single family and multifamily, homeowners, and renters) in order to maximize outreach efforts across multiple client programs.

CenterPoint Energy's Agencies in Action program provides **100% free energy efficiency upgrades to help income-qualified residents.**

Free Upgrades + Lower Electric Bills = **SAVE TWICE**

Are you eligible? Criteria include:

- Residential customer of CenterPoint Energy Electric
- Home at least **16 years old**
- Annual household income of **less than 200%** of federal poverty guideline or receiving benefits from a **public assistance program** (Food Stamps, Medical Assistance or Medicare, Supplemental Security Income, Public Housing, Children's Health Insurance, Temporary Assistance to Needy Families)

For other criteria and enrollment, **contact a participating community agency** ▶

AGENCIES IN ACTION PROGRAM ENERGY EFFICIENCY POTENTIAL UPGRADES

- ✓ LED lighting
- ✓ Attic and wall insulation
- ✓ Refrigerators
- ✓ Solar window screens
- ✓ Central heating and air conditioning
- ✓ Air infiltration reduction
- ✓ Water heating measures

CONTACT AN AGENCY TO ENROLL IN THE PROGRAM

<p>1 Ambassadors CCC Dr. Chris Spellman 817-689-6457 ccspas@msn.com</p> <p>2 Avenue CDC Dinah Eghan-Waife 713-864-8099 dinah@avenuecdc.org</p> <p>3 BakerRipley Sommer Harrison 713-685-6512 sharrison@BakerRipley.org</p> <p>4 Baytown Resource and Assistance Center Hilda Villalobos 281-424-5752 hilda.villalobos@baytown-resourcecenter.org</p> <p>5 Brazoria County Community Development Virginia Puente 979-864-1953 virginiap@brazoria-county.com</p> <p>6 Chinese Community Center Emily Liang 713-271-6100 emily@ccchouston.org</p>	<p>7 Fort Bend Habitat for Humanity Sherwin Sun 281-403-0708 sherwin@fortbendhabitat.org</p> <p>8 Greater Northside Plaza CDC Barbara Curry 713-864-8011 gnplcd@outlook.com</p> <p>9 Love Network of Baytown Mike Horner/Mel Stone 281-422-5683 lovenetworkofbaytown@gmail.com</p> <p>10 Network of Opportunities Abound Here (NOAH) Ed Bubb 832-287-9035 execdir@g0zhoah.org</p> <p>11 People's United Summit Allen Provost 832-423-3999 aprovest19@yahoo.com</p> <p>12 Premier Center Kathy West 832-506-8121 premierdiagnosticcenter@gmail.com</p> <p>13 VN Teamwork Mike Nguyen 281-495-8936 mikecnguyen@vnteamwork.org</p>
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AEP Texas Targeted Low Income Weatherization Program
AEPTexas.com/save

SAVING ENERGY IS FOR EVERYONE!

The AEP Texas Targeted Low Income Weatherization Program provides **100% free energy efficiency upgrades to help income-qualified residents.**

ELIGIBLE CRITERIA

- Residential customer of AEP Texas
- Annual household income of **less than 200%** of federal poverty guideline or receiving benefits from a **public assistance program***

* Food Stamps, Medical Assistance or Medicare, Supplemental Security Income, Public Housing, Children's Health Insurance, Temporary Assistance to Needy Families

For other criteria and enrollment, **contact a participating community agency** ▶

POTENTIAL UPGRADES

- ✓ LED lighting
- ✓ Attic and wall insulation
- ✓ Solar window screens
- ✓ Central heating and air conditioning
- ✓ Air infiltration reduction and duct sealing
- ✓ Water heating measures

CONTACT AN AGENCY TO ENROLL IN THE PROGRAM

ArkTex COG Bay City - Ingleside	903-280-8349
Community Council of South Central TX Uvalde - Del Rio	830-303-4376
Christian Brother Community Development Rio Grande Valley	956-309-3061
Community Action Committee of Victoria Goliad - Victoria - Refugio	361-578-2989
Community Action Corp of South Texas Laredo - Alice - Odem	361-207-1802
Community Services Agency of South Texas Carrizo Springs - Enclinal - Pearsall	830-876-2918
Hartlingen Community Development Corp San Benito - Alamo - Raymondville	956-421-2351
Pete Ortiz American GI Forum Corpus Christi	361-585-0318

Frontier Energy implements this program for AEP Texas.

Residential Customer Marketing and Outreach

Frontier designed flyers to advertise targeted low income programs we implement for residential customers of CenterPoint Energy and American Electric Power.



Illinois Commercial Food Service Program

Save instantly on qualifying high-efficiency kitchen equipment

Energy-efficient commercial food service equipment can offer energy savings of 10 to 70%* over standard models, depending on product category. That means for every \$1,000 spent on utility bills, you could be spending up to \$700 in unnecessary costs.

Commercial food service equipment has come a long way. Energy-efficient models are reliable and can help you save money. And with discounts up to \$4,000, you can choose the right equipment for your kitchen, at the best price and without sacrificing performance. For the full list of qualifying commercial food service equipment, visit: IL-FoodserviceRebates.com/qualifying-equipment

No paperwork needed

Forget about waiting for a rebate check. Your participating supplier will help you find equipment options best suited for your facility, fill out the paperwork, and instantly apply your discount on the invoice. Visit IL-FoodserviceRebates.com/participating-suppliers for a comprehensive list of participating suppliers.

Many types of equipment qualify for discounts, including:

Equipment	Discounts up to
Broilers	\$4,000
Steam Cookers	\$3,000
Demand-Controlled Kitchen Ventilation	\$2,500
Ovens	\$2,500
Dishwashers	\$1,500
Fryers	\$950
Griddles	\$500
Refrigerators/Freezers	\$300

Questions? Call us at 888-214-4014 or visit IL-FoodserviceRebates.com

Terms and conditions may apply.
This program is funded by Ameren Illinois, ComEd, Nicor Gas, Peoples Gas and North Shore Gas customers in compliance with state law.

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*energystar.gov/cfs

Statewide Illinois Commercial Food Service Program

Frontier created a [website](#) and the flyer shown above to promote the midstream/upstream Illinois Commercial Food Service program, which involves five participating utilities.



How much can I save?

Save energy. Earn rebates. Energy Upgrade California® Home Upgrade can help you take the next step toward more comfortable, healthy living. [Learn more](#)



Find a contractor near you

Start your Home Upgrade today with a Participating Contractor. [Learn More](#)



Attend an Event

Join us at a workshop or event and learn more about energy efficiency. [Learn More](#)



Community Events

There are no upcoming events at this time.

[See all events](#)



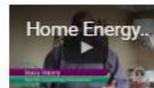
Contractor Events

There are no upcoming events at this time.

[See all events](#)



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Energy Network Website (Launch version) and Marketing Materials

Frontier created the website shown above and marketing materials shown below for the Energy Network, an energy efficiency organization funded by the California Public Utilities Commission and serving Southern California.

