

A background image showing a group of five diverse people in a modern office setting, engaged in a meeting. They are seated around a table, with large windows in the background. The image is partially obscured by a purple diagonal overlay on the left and a blue diagonal overlay on the right.

STATE OF LOUISIANA

Energy Efficiency
Program
Administration

Submitted to:

Kimberly O'Brian & Kathryn Bowman
Executive Counsel Office

Prepared by:

Joel McManus
Sr Director

April 3, 2024

COVER LETTER

Kathryn Bowman
Kimberly O'Brian
Louisiana Public Service Commission
Baton Rouge, LA 70821

April 3, 2024

Re: Energy Efficiency Program Administration RFQ

TRC is pleased to submit our response for the State of Louisiana's Energy Efficiency Program Administrator. We are excited for the opportunity to serve as the Louisiana Public Service Commission's (LPSC) program administrator to help the state design and implement a statewide energy efficiency program.

The list below highlights a few reasons why the LPSC will realize the greatest benefits with TRC as its partner:

- ✓ **Full-service energy efficiency portfolio management services** to successfully administer the full portfolio of programs for state and utility clients. We offer similar services for clients such as the New Jersey Board of Public Utilities and many utilities.
- ✓ **Expert transition capabilities** that create continuity for customers and a high level of customer service.
- ✓ **Our consultative implementation approach**, working alongside our clients to deliver strategic planning capabilities and cost-effective program design, providing our clients with full access to the easy-to-understand visualization of program data and optimal program reporting available through our proprietary data management system—Captures.
- ✓ **Equitably serving Louisianians** using a proven approach to outreach, marketing, and market characterization, leveraging our three established offices across the state to cost-effectively reach every potential participant.

We look forward to working with the LPSC to deliver a high-value solution. Please contact me for any additional information.

Regards,



Joel McManus, Sr Director
jmcmamus@trccompanies.com, 202-308-3150

A. CAPABILITY, CAPACITY, AND QUALIFICATIONS OF THE VENDOR

A.1 About TRC

TRC serves a broad range of public and private clients, with nearly 700 advanced energy professionals across 140+ offices.

We use transparent processes and systems to guide clients through comprehensive regulatory approval and program implementation. By applying creativity, experience, integrity, and dedication, we deliver superior results every time.

TRC's mission is simple: Understand our clients' goals and embrace them as our own. Guided by that corporate mission, TRC has been helping our clients achieve their goals for over three decades. From generation to delivery and energy consumption, TRC's breadth of experience spans the entire utility landscape and helps pave the way for innovative energy management, emerging technologies, and digital solutions.

A.2 Qualifications

Our advanced energy team has a 35-year track record of success in delivering full-service utility demand-side management programs, which includes launching new-to-market, and transitioning in-market, programs and pilots. This experience includes administering the State of New Jersey's Clean Energy Program. These programs serve commercial, industrial, residential, income qualified, multifamily consumer sectors.

We provide a few detailed examples of programs we manage on the following page.



PSEG Long Island

Commercial and Residential Energy Efficiency Programs

2012 - Present

As part of a unique 10-year energy efficiency and demand reduction contract, TRC provides turnkey planning, design, and implementation service for PSEG Long Island's commercial and residential energy efficiency programs in the state of New York, serving over 1.1 million customers. Within the utility's vision, budget, and requirements, we develop and implement the full lifecycle of energy efficiency programs, including incentive design and processing, outreach and marketing strategy, contractor oversight, call center support engineering reviews, and evaluation and regulatory compliance.

To date, we have onboarded over 800 contractors, paid over \$121M in incentives, and developed a CRM portal which is populated dynamically through a direct data exchange with the Utility's customer information system, APIs with databases such as ENERGY STAR® and a Partner Portal for companies to get instant information on project status and results.

Working with PSEG Long Island, TRC continues to hit the goal each year since starting the contract in 2015 while remaining under the budget. Our flexibility with program design and implementation have made it easy to hit the goals while the metrics changed from MW to MWh to Utility Gross MWh to MMBTU.

For PSEG Long Island, we provide the following support:

- **Trade Ally Training and Engagement.** Continuous improvement and a strong quality assurance program for local contractors are paramount to ensure proper installation of eligible measures, verifiable savings, and a superior customer experience.
- **Program Design.** We work in partnership with PSEG Long Island to develop the full lifecycle of energy efficiency programs, including incentive design, creating simple data collection tools, provide data analytics, introduce new measures, and forecast programs to ensure no programs shut down.
- **Program Planning.** We help PSEG Long Island complete long range planning projects.
- **Program Implementation.** Since 2015, TRC has designed and implemented **the Commercial Efficiency Program and Residential Energy Efficiency Programs.** Previously or currently, we offer all facets of energy efficiency, beneficial electrification, and demand response including prescriptive- and performance-based lighting and HVAC measures, performance-based custom measures, refrigeration

and commercial food service equipment, pool equipment, technical assistance, battery-operated equipment, BOC training, thermal storage, and CHP.

The major programs we implement include:

- **Commercial Efficiency Programs.** These programs include incentives for existing building and new construction across all facets of energy efficiency, beneficial electrification and demand response. We support all 100,000 potential PSEG Long Island customers, as well as the 400 installers, distributors, and engineering firms in the region;
- **Residential Energy Efficiency Program.** This program has a wide variety of incentives for measures supporting energy efficiency, carbon reduction (beneficial electrification), and demand response. The programs available to residential customers are delivered via a no-cost low-income audit and direct install program, low-income and non-low income heat pump and weatherization program, and a residential products program.
- **Residential Low-Income Audit and Direct Install Program.** The low-income audit and direct install program, designed and implemented by TRC, provides eligible customers with a free home energy audit, health and safety testing, free appliances like a room air purifiers, smart thermostats, and refrigerators, and energy education, referred to as the "Kitchen Table Talk." The one-on-one discussion and recommendations empower customers to take control of their energy behaviors.



New Jersey Board of Public Utilities

Clean Energy Programs

2006 – Present

TRC is the Program Administrator for the New Jersey Clean Energy Program, a statewide portfolio of energy efficiency and renewable energy programs serving homeowners, businesses, and government entities. For over 16 years, TRC has designed and administered the Commercial and Industrial (C&I) market portfolio while expanding its oversight and delivery of residential programs as of 9 years ago. This includes delivery of a full suite of residential and C&I energy efficiency and distributed generation programs and services through all market sectors.

TRC manages \$300 million in program funding annually for agency, business, and homeowner projects. We also oversee ongoing maintenance of multi-year program strategic planning efforts and regulatory approval processes.

When assuming leadership of this large and diverse energy program portfolio, TRC seamlessly integrated and improved upon programs previously run by seven separate utilities.

TRC's past and current implementation includes the design and administration of these programs: C&I Programs, including Prescriptive, Custom, Small Business Direct Install, Combined Heat and Power, New Construction, Local Government Energy Audit, and Large Energy User, and the Higher Education Decarbonization Pilot Residential Programs, including the Home Performance with Energy Star program, upstream big-box store offerings, appliance recycling, and new construction; Solar registration program services



NIPSCO

Residential and Commercial & Industrial Energy Efficiency Programs
2016 – Present

Since 2016, TRC has delivered cost-effective, results-driven energy efficiency programs for residential and commercial customers of NIPSCO, one of Indiana's largest natural gas and electric utilities. In total, TRC delivers 11 programs. On the commercial side we offer financial incentives and technical assistance to C&I customers for electric and gas projects through the Prescriptive, Custom with Retrocommissioning, New Construction, and Small Business Direct Install programs.

Services provided by TRC in the implementation of the C&I portfolio include program management, Trade Ally network management, technical review and engineering oversight, pre- and post-installation inspections, energy audits, outreach to customers and trade allies, comprehensive marketing and events management, call center staffing, and incentive processing and payment.



Mass Save

Massachusetts / Rhode Island Efficient Products Program
2004 – Present

Since 2004, TRC has implemented the Mass Save Program, an upstream and midstream products program for multiple utilities in New England, including PPL and Cape Light Impact, Eversource Energy, National Grid, and Unitil. TRC works with retailers, distributors, and manufacturers to provide customers with incentives on approved products, such as electric water heaters, pool pumps, and other products. Each year, our team complete 10,000 visits

to retailers across Massachusetts, providing marketing support, program training, and other services to help sales associates implement and market the program to customers.

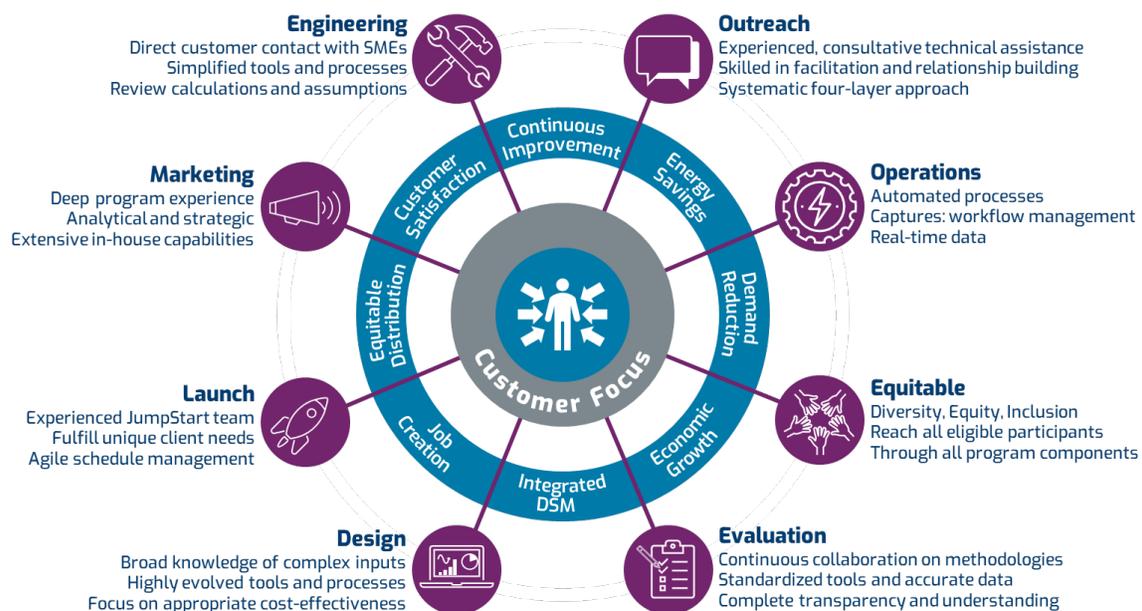
TRC partners with more than 40 manufacturers and retailers, providing marketing and sales support. We assess technologies to ensure that, as markets transform, we phase-out of technologies that no longer need to be incentivized and recommend new, more efficient technologies to continue to achieve energy savings goals.

B. OUR DELIVERY APPROACH

The customer experience is at the center of TRC's approach to managing and delivering the State of Louisiana's Energy Efficiency Programs, regardless of business type, location, or size. By developing relationships with participants, we go beyond *one-and-done* participation to achieve repeat and continuous program engagement. As a result, TRC will help the State of Louisiana create a robust and continuous savings pipeline and greater net benefits. Our highly customer-centric approach makes it easy for customers to say *yes* to energy efficiency.

Each customer has direct access to TRC's assigned outreach staff, who take the guesswork out of identifying savings opportunities and program participation. Our team engages participants in energy efficiency by providing consistent, informed program support. Our team also re-engages customers if program design changes to include added measures, increased incentives, or other motivators that would engage a new or repeat customer in the program.

TRC's Approach to Delivering the State of Louisiana's Energy Efficiency Programs



We help customers develop tailored projects that best meet their unique personal, facility, or organizational goals while maximizing energy savings.

This comprehensive approach increases the likelihood of repeat and continuous engagement that will result in deeper savings over time.

B.1 Program Delivery Components

B.1.1 General Administration

Budgeting

Budget management is a critical aspect of program administration. It is more intricate for portfolio level management and requires an additional level of skill to budget for a suite of programs. With experience handling portfolios for state and utility clients across the U.S., our financial resources ensure funds are allocated effectively, budget numbers remain transparent, and adherence to regulatory guidelines, such as the LCP Standards.

Together with all relevant stakeholders, we will create a detailed budget by program sector and by year, including considerations for equity components that influence our work from design through implementation. We will provide these budgets to the State of Louisiana and other stakeholders for review and approval at the beginning of the contract and at least annually.

Program Management

TRC's program management philosophy clearly defines processes and procedures, appropriately staffs the program, and ensures the team fully understands program goals. We embrace a continuous improvement management approach built on our ***if you can't measure it, you can't improve it*** mentality.

To deliver on this approach, we will **Plan, Do, Check, Act**.

- **Plan.** Determine management objectives, define key desired outcomes, identify performance indicators, and develop management strategies and actions.
- **Do.** Establish monitoring for performance indicators and implement strategies and actions to achieve objectives.
- **Check.** Periodically review the management program, report findings and recommendations, and evaluate management effectiveness.
- **Act.** Update management strategies based on performance indicators as well as management findings and recommendations.

Dispute Resolution

Through detailed training and de-escalation techniques, TRC will effectively minimize customer, trade ally, and other stakeholder disputes.

We also log complaints, should they occur, in Captures, including uploading any documentation related to the complaint to the Captures record. We apply a zero-complaint goal to every program we implement, because we understand the impact negative program experiences can have on customer and trade ally participation.

Our team makes sure to understand the customer situation and take into account all information necessary to appropriately address participant inquiries, update on project status, or provide additional attention the project may require.

Information Technology, Data Collection, and Management

We use our proprietary Captures platform as the primary, day-to-day data management tool to securely track and manage program information. Captures combines the marketing power of Microsoft Dynamics with TRC's management expertise to track energy efficiency projects while maintaining the flexibility to adapt to specific program needs. Captures provides a simple interface for data entry and automated workflows to provide status updates and alert staff to any action items needed to move projects forward.

Captures is one of the industry's most powerful reporting modules.

Captures is a highly configurable, cloud-based system providing real-time access to program data. We will grant authorized staff (including the evaluation team) access to the system through role-based user accounts. Authorized users can create, view, and share dashboards and reports and export data for such details as measures, savings, costs, and other target metrics. Captures uses role-based security. It ensures each user has access to only their appropriate parts of the system as defined by their role. The system administrator will restrict each user's access to program and customer data by setting parameters that allow them to view and/or change only the fields they are authorized to access.

Establishing a Reporting Schedule

Captures is scalable. It houses all program data to deliver comprehensive reports or a detailed project analysis. If the State's reporting needs change, we can easily adjust data points in Captures. We will collaborate with the LPSC to agree on the format, frequency, and process for providing reports. Reports can run daily, weekly, monthly, or on a specific day and we can offer direct access to in-system dashboards, or email these key milestones and program performance reports to a list of user-defined recipients. Because of Captures roles-

based security features, we can also separate system access and reporting by utility, as necessary.

TRC commonly provides the following reports our clients:

- **Monthly.** Monthly status reports indicate progress toward goals, milestone achievements, and other data points needed by the client to monitor program performance. Real-time program data is also available on Captures dashboards daily.
- **Quarterly.** Quarterly status reports provide large project highlights, marketing activities, outreach metrics, special event recaps, equity metrics, completed kWh, projects received, budget updates, and pipeline and forecasting updates.
- **Annual.** The annual report summarizes program information and recaps activities, achievements, budget status, and lessons learned.

B.1.2 Program Planning, Operations, and Implementation

We deliver holistic program administration services using best practices. These efforts include program management principles, thorough quality control protocols, and proactive engagement tactics. Our team provides superior customer service for our clients and consistently score high in program evaluations and customer and market participant feedback surveys. We also meet with the appropriate stakeholders to collaborate and receive input on the programs.

No one is better positioned to help the State of Louisiana maintain momentum and minimize disruption to customers and market participants than TRC.

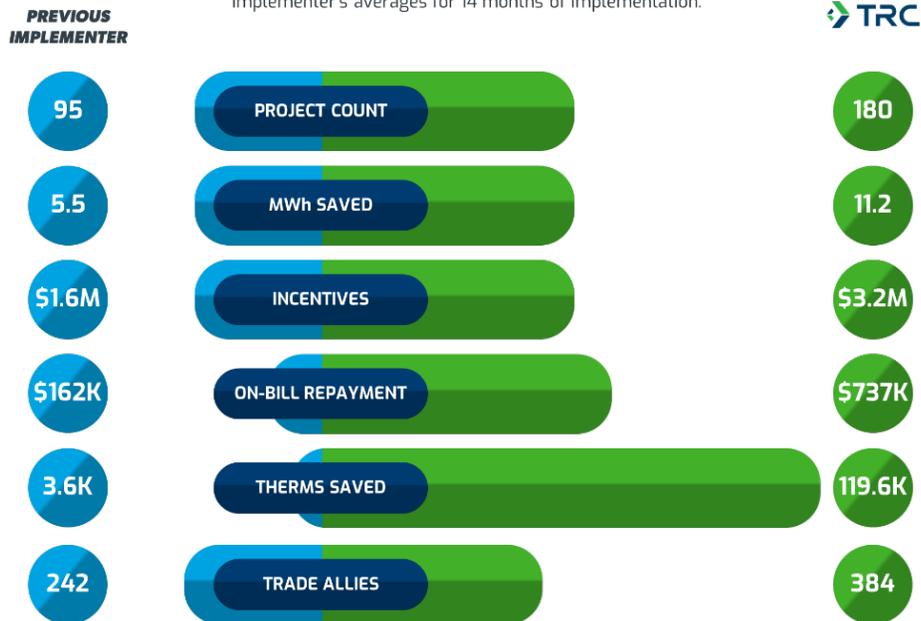
Recently, TRC took over as implementer for PSE&G's New Jersey Prescriptive, Small Business Direct Install, Custom, and Energy Management Programs. We successfully guided these program stakeholders through the transition while ensuring key requirements were completed on time.

The figure below illustrates our success.

OUR MUTUAL SUCCESS

ACROSS ALL TRC-RUN BUSINESS ENERGY SAVER PROGRAMS, WE
HAVE GROWN THE PIPELINE TO \$90,000,000.

The numbers below compare TRC's **average monthly metrics** for the **Prescriptive Program** for the first 17 months of implementation to the prior implementer's averages for 14 months of implementation.



Program Planning & Design

TRC will lead program planning meetings with the LPSC. We will analyze program data by market segment and technology. This analysis will help us update program elements and refresh delivery plans, timelines, and milestones at least annually.

Annual planning efforts incorporate innovative measures and enhanced delivery services to increase cost-effectiveness and improve the customer experience.

Our program design experts will gather feedback from the LPSC staff, utility stakeholders, residents (via participant satisfaction surveys), evaluators, and trade allies; our national and regional experts; and other regional stakeholders. We will use the information to pinpoint market factors that could impact the programs (e.g., seasonality, code changes, policy updates).

Critical Inputs to TRC's Program Design Approach



We will continue reviewing and adjusting program designs during portfolio administration to address changes in market conditions (e.g., cost or economics, preliminary evaluation findings) and gain approval from the appropriate stakeholders, as needed.

Program Design

Our evaluation and strategic planning will yield measures and methodologies for the LPSC to consider implementing and/or removing from existing program offerings. Our bottom-up approach for residential offerings focuses on a program built on products, where the commercial programs align with an overarching goal and appropriate measure mix. We perform program- and measure-level cost/benefit analyses. TRC will develop a Program Planning Tool specific to Louisiana. This tool will contain details on measures, attributes, and savings algorithms.

After the Portfolio Planning Tool is developed, we will build calculations into program applications. TRC will develop calculation workbooks and participation paths to optimize the customer experience and their project savings. These tools will collect data from the project, site, and measure level and provide project details in an easy-to-understand view. Our tools are optimized to avoid input and data entry errors.

Cost-Effective Program Design

Our program design experts use our proprietary program design software, ModelMaster, to design and track portfolio-level programs, simulate optimal incentive levels, and determine the most beneficial measure mixes to create the most cost-effective program.

Using historical data from Captures, program-specific goals/budgets and avoided costs data, and measure attributes from the TRM, our experts quickly calculate and report on optimal incentive levels and program forecasts to maximize cost-effectiveness.

ModelMaster quantifies uncertainty and assesses risk. It simulates several iterations and what-if scenarios for comparison and sensitivity analysis during the design process. Scenario planning analysis within ModelMaster will allow the LPSC to envision multiple future potential outcomes depending on assumption ranges defined for various markets. Market data is critical to successfully engaging participants. We leave no stone unturned when it comes to researching your markets. Our analysts and in-house market research experts seek program feedback, historical program results, customer billing data, and third-party demographic and firmographic data (e.g., ENERGY STAR® Portfolio Manager, Data Axel, Census, local permitting).

We use the following strategies to maintain cost-effectiveness:

- **Achieve a diverse measure mix.** We coordinate with our clients to evaluate the measure mix and incentives. We routinely add, remove, or modify incentives for eligible equipment based on national and local market trends, new technology development, and changes in baselines.
- **Perform cost/benefit tests at the measure, program, and portfolio levels.** To provide State of Louisiana with transparency and confidence in program design, we use the most up-to-date data and our proprietary ModelMaster tool for cost/benefit tests.
- **Cost savings through complete portfolio management.** With portfolio management experience, we can leverage administrative, engineering, and QC staff across the Louisiana programs. This experience allows us to balance and set incentives to maximize cost-savings for the portfolio.
- **Cross-promote programs to reduce marketing and outreach costs.** Cross-promoting programs improves lead to participant conversion rates because we are targeting customers who have already shown an interest in energy efficiency.

Manage Subcontractors and Service Providers

TRC maintains a dedicated subcontractor management team. These specialists manage our subcontractor contract developments, negotiations, executions, and ongoing compliance. Our team becomes intimately familiar with the operations of each contract they oversee and are ready to engage in programs to maximize the return on investment and to minimize risk for the LPSC and TRC.

Our “One Team” mentality keeps TRC, subcontractors, program participants, the LPSC staff, and other stakeholders in sync.

Effective subcontractor management relies on: Clearly defined scope of work, performance metrics, and budget; transparent invoicing guidelines consistent with the State of Louisiana

expectations; open communication policies; regular submission of staffing notes to track program progress and issues; and clear expectations for attendance and input at routinely scheduled meetings. We diligently recruit diverse subcontractor teams for our programs, monitor their scopes of work, and ensure prompt payment in alignment with our contract agreements. For each of our subcontractors, we develop reports that monitor company metrics throughout the contract.

At TRC, we take pride in fostering economic growth for diverse, small and/or historically underutilized businesses. We form long-term relationships, continuously seeking opportunities to expand their involvement and expertise in our programs.

TRC is dedicated to nurturing collaborative relationships with diverse suppliers, actively recruiting partners to support our energy programs.

Quality Assurance & Quality Control

Our commitment to quality, as reflected in our Value Statements and Quality Management Plan, draws from ISO 9001, Six Sigma, and industry best practices. We proactively prevent errors and quickly identify, correct, and eliminate future risk of issues. Documented procedures include: Project data quality and integrity, documentation handling, forecasting and reporting, customer service, regulatory requirements adherence and data request responses, activities and processes to address fraudulent contractor behavior, and team member training on QA/QC processes and procedures.

Program Marketing & Education

Our marketing team deploys result-driven strategies to increase program awareness for market participants across the country. We develop engagement strategies that educate participants, mitigate participation barriers, communicate program value to new and existing participants with simple messaging, and drive deeper savings across the portfolio. We will work closely with the LPSC to ensure program content is accurate and marketing material meets brand guidelines.

Our marketing materials focus on the entire portfolio of programs to encourage customers to explore all possible energy efficiency opportunities.

Comprehensive Outreach Support

We will address each audience across markets including residential, business, local government, and low income communities. Our outreach strategies are designed to bring projects in. Each program has different target markets, membership organizations, and other access points that require unique outreach. A customized outreach approach for each program allows outreach staff to act as a single point of contact for their designated

territory. We provide support in navigating energy saving opportunities and how to apply to the program.

Customer Service Support

TRC prioritizes the customer experience.

We will provide a dedicated toll-free number and email address. Our team stays up to date on program offerings and eligibility requirements. We also provide call scripts to our team to support any caller. If necessary, we can include non-English speakers to support calls from all participants. As appropriate, our staff will transfer calls to best meet customer needs. We will follow the State of Louisiana and TRC security protocols to maintain data security for customer information stored by the system as well as participate in customer experience strategy development with the LPSC.

If an issue arises, we track it in Captures and immediately address and resolve it using processes we collaborated on with the LPSC. Following these procedures, staff members can clearly identify who to consult when dealing with an escalated issue, and the State can see the actions we took toward resolving it. This process and tracking ensure that we close the loop on all issues.

Technical Assistance

Lack of a customer's technical expertise and regulatory awareness can create barriers to participation.

Our energy experts bring solutions to participants which optimize their energy savings and incentive payments.

Some of the support services TRC experts provide include: recommendations for participants; ensuring they have all the necessary information to optimize their energy efficiency upgrades; comprehensive assessments and handouts for technical topics such as building codes, new construction timelines, and more; investments in modeling software licenses and trainings to identify additional cooling and HVAC savings for Louisiana's residents.

Technical Assistance Support

| | | |
|--|--|---|
|  <p>Calculation Templates for Common Custom Measures</p> <p>Customers do not have to re-invent the wheel for each project, saving them time and money.</p> |  <p>Baseline Identification Support</p> <p>Our engineer experts attend project kick-off meetings to support baseline identification.</p> |  <p>Customer Segment-Specific Measure Bundles</p> <p>Guide customers to comprehensive projects proven to save energy in similar facilities.</p> |
|--|--|---|

Evaluation Support

It is essential to align the LPSC's programs with your third-party evaluation consultant to verify program savings. This will ensure claims are legitimate and clear the path to cost recovery and benefit recognition. TRC offers the unique insight of a proven implementer and an experienced evaluator. We implement energy efficiency programs with evaluation in mind—applying our holistic understanding of the process as both an experienced evaluator and program implementer. Our evaluation activities include:

- **Agreement on methodologies.** We align our project savings methodologies early to get agreement on savings estimates. We take the time to understand the techniques of evaluation firms and we use this information to calibrate methods for estimating savings
- **Accurate and timely data using standardized tools.** Captures tracks and records data required by the State of Louisiana for each project. We support the evaluator, fulfilling data requests, coordinating interviews, developing metrics, retaining back-up documentation, and reviewing draft EM&V plans
- **Complete transparency.** TRC regularly shares feedback on trends, issues, or successes with program personnel to enable ongoing program adjustments, when needed. We also perform technical reviews to provide evaluators with a look into our review process to verify it meets expectations.

Program Continuity Plan

Seamlessly continuing program administration midcycle is necessary for consistent program support. We already have local, experienced staff who are ready to handle any program changes that occur with this transition to put the customer service at the forefront.

We will provide a continuity plan with creative and effective solutions that support Louisiana's residents through this transition because we have done this before.

We will provide our continuity plan during our contract's kick-off, clearly noting all tasks and a timeline for completing the tasks. Our program team will also collaborate with the LPSC to incorporate stakeholder input and fine-tune the plan to the unique needs of Louisiana energy utility customers, providing program participants with no disruption to the programs or support for customers.

B.2 Program Operations and Implementation Strategies

Our team will deliver holistic program administration services for the state of Louisiana's Energy Efficiency Program using best practice program management principles, thorough quality control protocols, and consistent and proactive engagement tactics.

We will use our nationwide experience designing and implementing energy programs to provide comprehensive project lifecycle support for the LPSC's Energy Efficiency Programs.

Our implementation team used the same process and worked with the same national resources to start up and run the residential and commercial portfolios for PSEG Long Island and the New Jersey Clean Energy Programs.

B.2.1 Incentive Processing

Our application processing expertise spans the entire application processing lifecycle, from designing and managing online applications and incentive program websites, to issuing checks and providing call center support. This experience has taught us that implementing a successful energy efficiency program requires effective and efficient operating procedures.

Key Components of TRC's Incentive Processing Approach



Our operations team reviews applications with close attention to any discrepancies that may indicate fraud (e.g., duplicate submissions for the same equipment), suspect customer addresses, or disproportionately high sales percentages from a single market participant.

TRC monitors and processes all incentive projects in Captures. For each project, we confirm product eligibility, product quantity, and customer eligibility prior to approving the application for payment. In Captures, we enter, upload, store, and report on every application detail and supporting documentation, ensuring availability both in real time for our program stakeholders and for our monthly program reports. The system will also track each project through a series of statuses that collectively describe the entire project process, from application and initiation to final equipment installation and incentive check request and fulfillment.

Project Lifecycle Milestones



B.3 Market Participant Coordination

We recruit, train, and educate market participants using the strategies below:

- Providing regular program communication through newsletters, e-mails, and events
- Delivering one-on-one education for program processes and customer engagement
- Offering individualized assistance in submitting, monitoring, and completing project applications
- Forming and maintaining a Trade Ally Advisory Board (meets annually) to obtain detailed insight and honest feedback on our programs from the trade ally perspective
- Hosting trade ally events, including networking events and educational opportunities.

B.3.1 Contractor Engagement

Qualified, motivated, and properly trained market participants (trade allies, distributors/retailers, service providers, etc.) increase participation and deliver superior program results. The figure below shows our proven engagement and management process, which we couple with excellent customer service to their engagement and deliver high-quality projects with verifiable savings. We also promote our user-friendly tools that will simplify participation (e.g., easy-to-use calculators and tools, online project and application portals).

Trade Ally Management Process



We transform market participants into program ambassadors who are critical players in helping the LPSC achieve savings goals.

B.3.2 Contractor Training

TRC will work with the LPSC to develop and provide trade allies with meaningful training, technical guidance, and on-site field and in-office staff support to ensure they have a full understanding of the programs. We provide various training to market participants as

outlined in the table below. We maximize online training opportunities to reach all market participants and to allow all trade allies to make the best use of their time-constrained resources.

| TRAINING / LOCATION | TRAINING OBJECTIVES & TOPICS COVERED |
|--|---|
| <p>Orientation Training In-person or via webinar (as needed)</p> | <p>Topics covered: Program orientation and requirements. Objectives: Clearly communicate the value proposition, benefit from marketing and training support, build credibility through the State of Louisiana affiliations, and learn to present the business case for energy efficiency).</p> |
| <p>Market Participant Connections Informal and ongoing engagement</p> | <p>Topics covered: Program updates, question and answer forum, best practices, and program feedback. Objectives: Increase participation from less active trade allies, strengthening relationships with active market participants, and gathering feedback to support continuous improvement efforts.</p> |
| <p>Supplemental Training In-person, one-on-one, at the market participant's office (as needed) or web-based</p> | <p>Topics covered: Corrective action for non-compliance, variances, poor quality submissions. Objectives: Refresh market participant on program requirements to ensure a full understanding of program offerings and requirements to reduce errors, understand barriers to participation, and provide actionable insights to drive business growth.</p> |
| <p>Co-Trainings In coordination with manufacturers and distributors</p> | <p>Topics covered: Technology-specific Objectives: Efficiently use market participants' time by training them where they are already learning, such as Rheem's online HVAC manufacturer training.</p> |

B.4 Data Collection

One of the most critical aspects of energy efficiency program implementation is the protection and management of program and customer data. TRC takes this program tenet very seriously and vets all software, tools, process improvements, and platforms to eliminate the risk of data breaches and adhere to any security requirements, guidelines, and terms and conditions.

TRC's strategy is to:

- **Provide secure data storage and transfer.** TRC's information technology team uses program data collection and security plans that stipulate protocols for secure data storage, data entry, and maintenance. Security is applicable to digital and hard copy files with attention to sensitive participant information such as tax IDs and utility account numbers. This plan adheres to all federal or state laws and requirements.
- **Create structured organizational protocols for project files.** TRC will comply with the LPSC's file management protocols. We scan, store electronically, and shred hard copy documents submitted to the program for customer data security.
- **Meet data reporting needs.** With the support of the State, TRC will build program forms, data collection methods, and program reports that fulfill all tracking and reporting needs.
- **Prepare for program evaluations.** TRC collects program data in a format accessible and acceptable for easy and low-cost program evaluation, audit, or quality assurance review. This strategy enables us to perform internal program quality evaluations.

| Key Tasks | | 2025-2028 | | | | | | | | | | | |
|------------------------|--|-----------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|
| | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sept | Oct | Nov | Dec |
| Program Administration | Hold ongoing program meetings monthly for key accomplishments and program updates | | | | | | | | | | | | |
| | Participate in ad hoc meetings | as needed | | | | | | | | | | | |
| | Train / cross-train staff on program / process updates | as needed | | | | | | | | | | | |
| | Provide monthly status reports & project statuses | | | | | | | | | | | | |
| | Provide quarterly reports | | | | | | | | | | | | |
| | Provide annual year end results report | | | | | | | | | | | | |
| Program Operations | Submit performance payment, program management, and marketing invoices | | | | | | | | | | | | |
| | Support evaluation, audits & data requests | ongoing | | | | | | | | | | | |
| | Update incentive workflow based on program updates | | | | | | | | | | | | |
| | Complete all project inspections | | | | | | | | | | | | |
| | Answer inquiries submitted via online, phone, or email | ongoing | | | | | | | | | | | |
| Budget & Forecasting | Track submitted projects, review project measures & collect missing data | ongoing | | | | | | | | | | | |
| | Review previous year forecast vs actual financial & savings | | | | | | | | | | | | |
| | Develop annual financial & savings review forecasts | | | | | | | | | | | | |
| | Provide a detailed program budget with category breakdowns | | | | | | | | | | | | |
| | Update financial & savings forecasts & actuals/explain variances monthly | | | | | | | | | | | | |
| | Monitor financial forecast & budget | ongoing | | | | | | | | | | | |
| | Provide quarterly forecast & projected spending updates | | | | | | | | | | | | |
| Marketing & Outreach | Review & incorporate industry changes that may impact measures/program | ongoing | | | | | | | | | | | |
| | Update existing or create new outreach & marketing materials and collateral | ongoing | | | | | | | | | | | |
| Service Providers | Review marketing and outreach and assess if material is required for program participation | | | | | | | | | | | | |
| | Perform ongoing outreach to service providers, communicating their program performance | ongoing | | | | | | | | | | | |
| | Attend events promoting the programs | ongoing | | | | | | | | | | | |
| | Recruit new market participants, as required for participation | ongoing | | | | | | | | | | | |
| QA/QC | Train partners on technologies, program updates, etc. | ongoing | | | | | | | | | | | |
| | Update QA/QC process flow / incorporate evaluation recommendations | | | | | | | | | | | | |
| | Manage data quality, integrity, documentation handling | ongoing | | | | | | | | | | | |
| | Perform post inspections | ongoing | | | | | | | | | | | |
| Data Integration | Complete program year post-inspections for annual reporting | | | | | | | | | | | | |
| | Monitor data security protocols & update IT systems and integration accordingly | ongoing | | | | | | | | | | | |
| | Provide evaluator with relevant project data | ongoing | | | | | | | | | | | |
| | Collect, track, & report on program data | ongoing | | | | | | | | | | | |
| | Push program data to the State's IT platform | ongoing | | | | | | | | | | | |



 TRC