



# **Louisiana Public Service Commission**

**RFQ 24-01**

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April 4, 2024



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Kimberly N. O'Brian  
Kathryn H. Bowman  
Louisiana Public Service Commission  
602 North Fifth Street (Galvez Building) (70802)  
Baton Rouge, Louisiana 70821-9154

Dear Ms. O'Brien and Ms. Bowman,

VEIC is pleased to submit this response to the Louisiana Public Service Commission (LPSC) with our qualifications as a third-party energy efficiency program administrator (PA).

As a woman-led nonprofit with a majority-female board, **VEIC** is the national leader in third-party program implementation, offering over 20 consecutive years of applied PA experience in energy efficiency. VEIC's experience started in 2001, when we were contracted by the Vermont Public Service Commission to administer **Efficiency Vermont**, the nation's first statewide energy efficiency program. Other programs we administer include **Efficiency Smart**, for American Municipal Power in the Midwest, and the **DC Sustainable Energy Utility** (DCSEU). VEIC also plays critical program planning and design roles on the third-party PA teams for **Focus on Energy** (statewide efficiency in Wisconsin), **Hawai'i Energy** (statewide efficiency), **TECH Clean California** (statewide heat pump program), and **CalNEXT** (California's emerging electric technologies program).

In addition to program administration, VEIC has helped clients nationwide meet energy and climate goals through rigorous energy efficiency portfolio review and innovative program designs, tailored to the unique needs of each client's customers and community. VEIC's energy efficiency programs are designed to cost-effectively help customers reduce energy usage, achieve expanded energy savings, and reduce overall emissions.

We look forward to the opportunity to share more specific approaches during an interview or through the RFP process. We are also indicating that there are no conflicts of interest identified. Please contact Joanne Bachmann, 802-540-7838 or [jbachmann@veic.org](mailto:jbachmann@veic.org), for any questions or additional information.

Sincerely,

A handwritten signature in black ink that reads "Jennifer Wallace-Brodeur". The signature is fluid and cursive, written in a professional style.

Jennifer Wallace-Brodeur, *Managing Director, Business Development*

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# Qualifications

VEIC has over 20 consecutive years of experience as a third-party PA for energy efficiency programs in different market and regulatory environments across the country. We adapt efficiency programs to local conditions and needs by combining deep on-the-ground expertise with our national bench of experienced staff. As a nonprofit, we ensure all ratepayers can access and benefit from efficiency programs.

## General Administration

### Point of Contact/Liaison (#1 in RFQ)

**National leadership.** VEIC coordinates its statewide energy efficiency programs with regional and national organizations through membership and participation in the [Southeast Energy Efficiency Alliance](#) (SEEA), [Northeast Energy Efficiency Partnerships](#) (NEEP), [American Council for an Energy-Efficient Economy](#) (ACEEE), the [Consortium for Energy Efficiency](#) (CEE), and the [Association of Energy Services Professionals](#) (AESP), co-developing program design and implementation best practices on deploying emerging technologies. We also have close advisory and other relationships with the [National Renewable Energy Laboratory](#) and other [National Laboratories](#).

**Collaboration with local partners.** VEIC takes a highly collaborative approach to its PA work. In DC, VEIC coordinates with the District of Columbia Department of Energy & Environment (DOEE) on serving [LIHEAP](#) and [Weatherization Assistance](#) recipients. VEIC provides program and technical support to [Vermont Gas Systems and Burlington Electric Department](#), helping to deliver consistent customer experiences while maximizing the value of Vermont's energy efficiency investments. VEIC has also been an implementation partner for utility, weatherization, and State-sponsored programs serving shared customers.

**Collaboration with utilities.** The VEIC Team engages regularly with utilities in its work as a regulated third-party PA and as a consultant. VEIC sees utilities as critically important partners, especially with the impetus toward more electrification and connected devices embedded in emerging State and federal policies. For electric utilities, this means coordinating services for adequate supply in building electrification and flexible load management. For gas utilities, this can mean supporting the training of gas technicians to install equipment (such as heat pump water heaters). We work with distribution utilities (DUs) in jurisdictions across the country to inform transmission planning.

**Partnerships serving shared customers.** We maintain close relationships with DUs through intentional partner relationship management, with the objective of providing excellent ratepayer service at the center. DUs are our partners in achieving mutual goals for transmission and distribution functions supporting grid stabilization (via [flexible load management](#), strategic energy management, and other such energy efficiency strategies in the commercial and

industrial (C&I) sector). Such partnerships are also important for transparency around system challenges. Alongside the state's transmission company, the [Vermont Electric Power Company](#) (VELCO), VEIC is a member of the [Vermont System Planning Committee](#). The Committee meets to forecast long-term energy needs and to discuss grid reliability.

VEIC's Solar for All team in DC works hand in hand with the District's electric utility, Pepco, to create workable processes for photovoltaic system installation (from "approval to install" to "approval to operate"), ensuring that the electrical system from the supply to the home PV system or community solar installation is properly completed. This collaboration minimizes issues with power factor and power quality.

**Market transformation, market support.** VEIC's approach means that customer incentives are just a part of a comprehensive vision for a market-based approach to program design, resulting in market transformation. VEIC provides training and support to manufacturers, vendors, technicians, contractors, and other trade allies and regional partners up and down the supply chain. This gives the private sector meaningful participation in clean energy, and results in a flexible, responsive marketplace that delivers energy efficiency solutions at scale.

Nearly 10 years ago, [VEIC created an effective way to work with the supply chain](#) in bringing high-efficiency appliances—namely, heat pumps—to market in New England and the Northeast. The sales, marketing, inventory, and training protocols VEIC offered to wholesalers, distributors, manufacturer reps, and installers resulted in high product penetration rates and rapid market adoption. This strategy has resulted in the [installation of 63,000 heat pumps](#) in Vermont, more per capita than anywhere else in the east.

**Collaboration with stakeholders.** VEIC is expert at working with large numbers of stakeholders to deliver results on complicated projects. Our projects include stakeholder engagement and facilitation for groups as large as 100+, helping them collaborate and reach agreement on topics as broad ranging as community energy planning and technical energy efficiency savings calculations. We understand how to collaborate and accept input from members of large groups, how to gain consensus and how to catalyze that data to make informed decisions for the best outcome of the stated goals of the project. For the Illinois Public Utilities, we facilitate the Illinois TRM Technical Advisory Group, consisting of over 140 stakeholders representing regulated utilities, the state energy office, regulators, and environmental advocates. VEIC leads a monthly working group in Vermont with its 19 utilities. The working group covers rate structures, flexible load management projects, market engagement methods, relationships with the supply chain on electrification measures (such as heat pumps), and regulatory matters. These working groups have diminished the historical tension between the demand side and the supply side, creating high-value, long-term partnerships.

**Consulting with utilities and commissions nationwide.** VEIC works closely with utilities and commissions as a PA and within the consulting practice. For example, VEIC works with utilities across the country on program reviews, to ensure new programs are added to the portfolios, especially supporting LMI customers. For example, we supported DTE Energy with a comprehensive energy efficiency program review and recommended ten new pilot ideas to grow savings when lighting solutions were ineligible for incentives within residential programs. To date, DTE has tested all the ideas and implemented many into the program portfolio.

VEIC supports commissions in HI and WI with similar approaches. In HI, the AES power plant that supplies electricity to the island of Oahu was to close by the fall of 2022 to align with state decarbonization goals. While the utility, Hawaii Electric Company (HECO) and other outside developers have been preparing for this planned closure by developing solar + storage projects, the projects were behind schedule due to the pandemic, supply chain delays, and high interconnection fees. VEIC worked with the commission to re-prioritize the energy efficiency programs for the largest energy users to focus on demand reduction and energy efficiency opportunities during peak demand. In response to the needed 50MW reduction, VEIC developed a targeted program to provide account management and engineering support to deeply engage large coincident peak demand users. The program targeted both peak demand reduction and energy efficiency savings through low and no cost operational savings, identification of capital projects, as well as innovative strategies to support large customers with flexible load management strategies and continuous energy improvements.

## **Organizational, Financial, and Data Tracking (#2 in RFQ)**

We design and maintain secure software and systems that track data for program participants and trade allies. We also create documents supporting program operation and safeguarding confidentiality—each adapted to the needs of the client.

Collectively, VEIC has processed and reported 27 million measures, saving program participants approximately \$5 billion over their lifetime. VEIC's systems have processed \$600 million in payments to customers and program partners, generating 36 million megawatt-hours (MWh) and 68 million MMBtus in lifetime energy savings across three utility-scale program portfolios.

**Emerging information technology (IT) solutions.** VEIC has built software that delivers benefits in the following three areas:

- Increasing operational efficiency and reducing administrative costs. For example, our Qualified Product Management application maintains a master database of energy efficiency products across VEIC's program application infrastructure.

- Streamlining the experience of our customers, partners, and ratepayers. By deploying VEIC Upstream and VEIC Online Rebates, VEIC simplified the rebate application process and reduced rebate turnaround time for both market partners and program participants.
- Improving quality and ensuring performance of the energy solutions we recommend. Energy modeling in OpenStudio® supports innovative program delivery and reduces verification time of program impacts.

In addition to continuously improving our existing IT processes and products, VEIC is exploring the benefits of artificial intelligence (AI) solutions, especially natural language processing technologies. Where these technologies meet our definitions for safe, reliable, and beneficial, we expect to introduce AI solutions into our applications and systems.

**Customized software to meet the need.** VEIC's custom software stack supports program design and client reporting requirements. VEIC collects data from utilities, subcontractors, retailers, and other market partners, to integrate customer relationship management, project management, and measure analysis and reporting features. VEIC's software also supports long-range scenario modeling of budgets, measures, programs, and portfolios.

Three principles inform VEIC's software development: (1) efficiency and process automation that streamlines administration; (2) data quality that ensures the accuracy of client reporting and solid realization rates; and (3) transaction management that provides transparency on all customer and partner interactions.

Ongoing engagement with administration and implementation teams, business leads, and user groups ensure that VEIC continuously improves its software as business needs change. VEIC's Data and Technical Services Team provides strategic technology services, energy savings reporting and analytics, and evaluation and measurement (EM&V) functions. In addition, VEIC conducts database management, data warehousing, and data quality tasks to meet regulatory, operational, program, and financial reporting needs across its portfolio.

**Designed for transparency.** VEIC's data tracking systems produce program-, initiative-, and project-level administrative and financial data. We provide regulators with required periodic and ad hoc reports, and consistently met criteria for federal reporting on administrative and financial status.

**Integrated IT.** VEIC's proprietary software system, Tracker, enables end-to-end program management and reporting via accurate, centralized records of prospective applicants, details and dates of communications, program application status, approved project stages, and project-level energy-saving measures. Tracker also stores related documents and sets up appropriate incentive payments.

Tracker is cost-effective and optimized for third-party program administration reporting. Tracker allows a transparent view into our algorithms, enabling accurate annual third-party assessments of VEIC's programs in Vermont, Ohio, Michigan, Delaware, and DC.

**Equity-related data collection.** VEIC collects and analyzes data on household demographics, building characteristics, unit operations, and behavior to determine where income-qualified assumptions are warranted. In Illinois, our income-qualified Technical Reference Manual (TRM) Working Group used these data to create a measure that provided cooling in income-qualified homes during the COVID pandemic.

**Utility data integration.** For over 20 years, VEIC has worked with DUs on preparing and transmitting customer-related billing data, including advanced metering infrastructure (AMI) interval data where available. We have collaborated with DU partners and regulators to produce common utility data standards and transfer protocols that ensure least-cost, agreed-upon access. VEIC ingests and integrates billing data from 15 utilities and interval data from four utilities with AMI-enabled metering systems and uses this to inform program design and implementation.

**Highest standards.** VEIC manages authentication and access for all its applications according to strict data ethics protocols. **To date, the VEIC portfolio has never experienced a data collection failure that compromised program performance.**

## **Success Monitoring and Tracking (#3 in RFQ)**

**Ensuring savings performance.** Demonstrating actual energy savings across the lifetime of efficiency measures makes it possible for energy efficiency to be a reliable power supply resource. VEIC's EM&V work creates and assesses the information necessary to verify the achievement of performance metrics and to bid demand resources into regional capacity markets.

**Adept at performance metrics.** Managing to each program's goals requires continuous tracking of performance metrics and monthly reporting to staff who are accountable for achieving each goal. This allows corrective action with subcontractors and/or resource reallocation to improve results, as necessary. Such action might involve modifying incentives, assessing continued subcontractor membership in the network, increasing promotion, or introducing new strategies and programs.

**Innovation in performance metrics.** VEIC, regulators, and clients have together produced performance metrics that reflect public policy and client goals, capturing wide-ranging clean-energy program benefits—not just energy and cost savings. VEIC programs have used metrics for job creation, greenhouse gas (GHG) reduction, total resource benefits, geographic and sector equity, weatherization comprehensiveness, flexible load management, and administrative efficiency. Through our years of experience as a program administrator, we know how to handle many performance metrics and balance competing priorities. The DOEE, which oversees VEIC's work on the DCSEU, recently revised the DCSEU's contract goals to focus on GHG emissions reductions, allowing VEIC to weigh more equally energy and non-energy GHG reduction

measures such as the remediation of refrigerant leaks from HVAC and refrigeration technologies.

**Importance of evaluation.** Ongoing impact and process evaluation allows VEIC to improve its program implementation procedures and quality assurance (QA) protocols. Evaluations yield recommendations that help mitigate risk and ensure our programs best meet the changing needs of our customers.

**Quality assurance protocols that increase trust in program results.** VEIC's QA protocols are both internal and external (including documenting quality assurance to the client, regulator, and other interested parties). Our QA protocols have established VEIC as a trusted PA and yielded among the highest impact evaluation realization rates (verified energy savings compared to claimed energy savings) in the country, thus mitigating risk in over- or under-stating program savings claims. Over the last decade, we have consistently achieved a portfolio average realization rate of 94.4% for custom programs and 99.1% for prescriptive programs. This is comprehensive of C&I, residential, multifamily, and income-eligible market segments. Since 2019, the average realization rate across VEIC's three PA programs has been 99.2% for claimed thermal, electric energy, and demand savings. The lowest realization rate for the same period was 97.75%.

The basic elements of VEIC's QA work involve:

- Qualification of subcontractors and their firms, according to basic work performance standards, as participating contractors or as members of a contractor network; and maintenance of these qualifications through ongoing, technology-specific training
- Training of the workforce involved in specific programs whenever new technologies or practices are introduced
- Controls in data gathering, built into VEIC subcontractor portals for programs that require data capture for reporting to regulators and clients
- On-site verification and retro-commissioning of buildings to ensure post-project energy performance is as designed and/or modeled
- Reconciliation of prescriptive and custom measures in databases

**Quality assurance across all program types.** VEIC's EM&V team uses QA protocols to mitigate internal risk to its databases. For example, custom QA involves random sampling of custom C&I projects to verify accuracy in savings assumptions (based on site documentation). It also verifies measure installation via site inspection, invoices, and electric or fuel billing analyses. This custom QA aligns with external impact evaluation and addresses issues before year-end close. Prescriptive QA verifies database accuracy of TRM characterizations, thus confirming savings values, aligning documentation with chosen measures in the tracking system, and making sure that implementation procedures follow best practices.

VEIC's success in savings verification and its ability to improve protocols and documentation to mitigate energy savings claim risk have resulted in realization rates in the 95% to 100% range for years.

## **Standard Operating Procedure (#4 in RFQ)**

VEIC's mission—to generate the energy solutions the world needs—inspires creativity, resourcefulness, and special attention to those who need affordable clean-energy services the most. Our exceptional staff across VEIC strive to make a lasting, beneficial difference in the clean-energy economy.

VEIC uses its PA talent recruitment, onboarding, training, and retention strategies to fulfill start-up and ongoing operational improvement objectives. When we build a new program, we combine initial direction from our start-up and subject matter experts with support from local talent within the first year of operations. New hires then become part of VEIC's network of local, regional, and national energy efficiency program experts.

VEIC is a Certified Great Place to Work, and as we on-board new hires, we keep the [Great Place To Work® Trust Model](#) front and center.

VEIC transforms markets through an operating structure that links locally based employees with national industry experts. Employees on the ground bring the knowledge and relationships needed for program success while industry experts based across the US provide best practices and cutting-edge insights to each program we operate. This model enables us to address the needs of each customer class, leading to sustained participation—a key driver for market transformation and the attainment of high energy savings goals.

VEIC is a one-stop shop PA providing our PA clients with all the services required to effectively deliver industry-leading energy efficiency programs. Our full team is dedicated to driving success.

VEIC staff have specific expertise in key market segments such as manufacturing, agriculture, small business, institutions, and income-eligible customers. They also bring complementary skills in refrigerant management, controls, thermal shell, HVAC, and other technical areas.

## **Confidentiality (#6 in RFQ)**

**Commitment to confidentiality.** VEIC protects information via its Confidential Information Management Systems (CIMS) and Information Security Management System (ISMS). VEIC's CIMS procedures limit the use of and access to program data, preventing inappropriate disclosures.

Every VEIC staff member agrees in writing to these procedures, as do all vendors, contractors, subcontractors, and other third parties with access to such information. VEIC commits to

notifying clients of any unauthorized access, investigating, reporting findings, and advising on remediation. We log requests to disclose customer-specific data and check them for adherence to the allowed purpose(s) before disclosure.

VEIC's ISMS contains prescribed standards to protect information systems and data. VEIC employs full-time Information Security experts who ensure compliance with VEIC's ISMS. VEIC uses administrative and technical security controls to manage cyber-risks. Abode follows a similar process with its Written Information Security Program (WISP), mandating best practices for protecting confidential, personal, or sensitive information.

**Custom privacy policies.** VEIC maintains a publicly available and tailored privacy policy for each of our programs.

## Program Planning, Operations, and Implementation

### Program Design (#5 in RFQ)

**Producing a program portfolio.** In collaboration with our clients, VEIC designs market-based programs that aim to achieve market transformation. We use product life cycle management principles to align new initiatives with goals—with stakeholder input and training for staff and subcontractors. For example, for the [Vermont PUC's 2024–2026 Demand Resources Plan](#) proposal, VEIC collected feedback from 58 customers, partners, and other stakeholders, along with over 1,300 public survey responses. Ideation processes involve cross-functional staff teams who design solutions that meet criteria for quality, equity, and contributions toward program performance metrics.

Concept development integrates stakeholder input with VEIC's engineering advisors and other technical subject matter expertise, and strategies for mitigating risks. We then develop the program product by designing an ideal customer experience and creating the business process that will deliver it, each and every time. To plan for implementation, we map actions necessary to support savings claim methods, staff resource planning, budgeting, technical assistance, tools and systems for managing implementation, marketing and communication planning, legal documentation, tracking and reporting procedures, and staff and partner training plans.

**Equitable and human-centered.** VEIC uses stakeholder outreach, customer feedback, and continuous improvement methods to inform its plans. We especially use [design thinking](#) in considering equity and customer mapping throughout our processes and operations.

**Informed.** VEIC's IT and financial management systems offer visibility into program status and outcomes, enabling planning for energy efficiency programs. VEIC Vision® Navigator is our proprietary application for forecasting and planning energy efficiency programs to ensure programs meet their goals within budget and generate necessary energy savings and emissions reduction targets. In the last five years, we have recommended improvements for programs in

Maryland, New York, New Hampshire, Rhode Island, and Massachusetts, based on engagement with regulators, consumer advocates, utilities, and advisory boards.

**Agile.** When recent flooding damaged or destroyed more than 4,000 Vermont homes and 800 businesses—including their space- and water-heating equipment and electric panels—VEIC acted quickly. Coordinating with DUs, we planned and delivered a [comprehensive flood relief response](#) in just eight weeks. Two years earlier, VEIC successfully managed [many emergency responses to the COVID-19 pandemic](#), prioritizing income-eligible residents and launching an indoor air quality program for 80% of the state’s schools within three weeks of a legislative grant award.

**Forward-looking.** VEIC’s Emerging Opportunities group investigates promising technologies for inclusion in its programs. It scopes market barriers, makes the case for new savings attribution or metrics, and produces engineering research and development plans and pilots with DUs. This group also tracks scalable innovations from new technology solutions and examines strategies for overcoming barriers to program adoption and ultimately, market transformation.

VEIC engineers and other experts advise other PAs on innovation. We lead the [Future Focus](#) innovation and pilot portfolio for Wisconsin’s [Focus on Energy](#), advancing new technologies and strategies for its residential and business customers. For [TECH Clean California](#), VEIC oversees six regional pilots for overcoming barriers to building electrification among income-eligible households, multifamily building owners, renters, and disadvantaged communities (DACs). These results have informed policy and regulatory recommendations that support progress toward California’s residential decarbonization goals. VEIC also designed and coordinates TECH Clean California’s [Quick Start Grant program](#), which funds pilots for overcoming barriers to heat pump space- and water-heating adoption. The first two funding rounds have distributed \$4 million, with 86% allocated to projects that benefit DACs.

## **Contractor Hiring and Vetting (#7 in RFQ)**

**Intentional, customer-centric, and cost-effective.** Unlike PAs that view their roles primarily as contract managers of large numbers of subcontractors, VEIC takes an intentional approach to subcontracting, basing decisions on what serves customers best. We select partners that share our commitment to high-quality results and organizational values and culture. They must also be able to support exceptional customer experience by aligning staff interactions with customer needs. We thus lower overhead costs necessary for managing large subcontractor teams.

**Equity in subcontracts.** It is important to have a clear approach to managing and measuring diversity and inclusion within procurement and bidding processes. We seek to serve communities and businesses that have been traditionally disadvantaged, while also ensuring effectively engaging partners who identify as small businesses, disadvantaged (socially or economically); women-owned; veteran-owned; minority-owned; LGBTQ-owned; and/or serving disabled, and/or rural customers.

**Contractor networks.** VEIC created Vermont’s [Efficiency Excellence Network](#) of approximately 500 independent contractors, distributors, retailers, and electric vehicle dealers who receive professional training and support from Efficiency Vermont staff. In 2022, members reported a 91% satisfaction rate.

**The model for the next-generation energy efficiency program.** Under a conventional PA model, four or more contractors might approach the owner of a small convenience store to ask if the owner were interested in energy efficiency upgrades. One firm might handle lighting, and another HVAC, direct installation, insulation, or refrigeration. These visits can happen across months, running up program costs. Meanwhile, the store owner likely would not know what to do.

VEIC is different. Our method ensures that the store owner gets one visit from one energy efficiency expert (representing the hub). That expert walks through all the options for savings, and then helps with a plan and offers the incentives and financing to pay for the projects. Better outcomes. Better customer experience. Lower program costs.

## Financial Systems (#8 in RFQ)

**Expertise regulators appreciate.** VEIC has managed PA budgets in accordance with requirements similar to the LPSC’s criteria for cost-effectiveness. VEIC’s bottom-up budgets give it comprehensive knowledge for meeting performance and spending targets. VEIC’s program implementation budgets consider program management, tasks, workflow, and critical performance metrics. This approach has also governed successful, multimillion-dollar, multi-year federal projects.

**Informed by local market conditions.** VEIC has successfully managed its own budgets when other efficiency programs have either overspent or failed to deploy available budgets (the industry offers many examples of shortfalls of 25+%). VEIC’s preparation for supply chain disruptions and post-COVID price increases for goods and contracted labor involves flexible contingency planning. We coordinate and monitor staff hours, subcontracts, vendor relationships, supply chain conditions, and project and incentive pipelines to meet budget targets. *A recent result:* Efficiency Vermont ended its 2021-2023 performance period having deployed 99.95% of its core program budget.

**Highest financial standards.** VEIC ensures strict compliance with State and federal regulations, and with generally accepted accounting principles (GAAP).<sup>1</sup> Our accounting practices have produced clean independent audits for over 10 years. The federal government has designated VEIC as a [low-risk auditee](#).

**Proven ability to be a fiscal agent.** As Efficiency Vermont’s [Fiscal Agent](#), VEIC administers public benefits funds and funds from other sources. We manage fund collections from DUs and

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<sup>1</sup> As defined by the Governmental Accounting Standards Board and Financial Accounting Standards Board.

disbursements, and comprehensively report outcomes aligned with regulatory requirements. We promptly disburse incentives to customers and invoice clients for timely reimbursement. Since assuming the role of Fiscal Agent in 2020, VEIC has received consistent, clean independent audits.

## **Branding and Messaging (#9 in RFQ)**

***Understanding the audience.*** VEIC's Consumer Insights research group provides localized, segmented data for understanding prospective and current customers' needs. We use these data to [build brands, develop marketing plans, inform program design, and ensure program participant satisfaction](#).

***Reaching diverse audiences.*** We have successfully marketed our energy services to racially and economically diverse communities in urban, suburban, and rural areas. We produce customized marketing campaigns for technical and non-technical audiences. We translate our marketing material, apply accessibility best practices for design and website development, and provide website translation tools to ensure equitable access to our services.

***In-house expertise leads to better outcomes.*** VEIC's comprehensive communications and marketing group builds highly effective communications that drive engagement with energy efficiency programs across all customer types. We built and manage the brands, websites, and marketing campaigns for [VEIC](#), [DCSEU](#), [Efficiency Smart](#), and [Efficiency Vermont](#), and have completed projects for hundreds of clients. This group also deploys marketing insights that inform program design.

Our marketing and communications team have decades of experience creating impactful communications campaigns across channels including, TV, radio, digital, events, social, and print. Our websites are intuitive, secure, and accessible. We have created campaigns for residential customers, small and medium-sized businesses, rural and urban communities, large industrial facilities, and government entities and utilities.

***Exceptional results.*** Since 2021, VEIC has earned very high Net Promoter Score (NPS)<sup>2</sup> values across its portfolio of residential programs. For example, Efficiency Smart has an NPS of 77; the DCSEU has an NPS of 78; Efficiency Vermont's residential new construction program has earned an NPS of 64; income-qualified programs are at 68; and Home Performance with ENERGY STAR, 80.

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<sup>2</sup> Any Net Promoter Score over 50 is considered "Excellent."

## Technical Reference Manual (#10 in RFQ)

**National experience in TRM development.** VEIC produced the first nationally recognized TRM in 2000. We have maintained and updated the Vermont TRM for over 20 years, and we do the same for our Efficiency Smart and DCSEU TRMs. VEIC has also developed and updated TRMs for Ohio, Illinois, Iowa, Missouri, Indiana, and the mid-Atlantic region. Most of these TRMs contain gas and electric efficiency measures.

**Driving the conversation.** Our EM&V team stays up to date on new evaluation and program data, codes and standards changes, and other industry changes relevant to savings determinations. But we also have expanded our TRMs to contain non-energy GHG measure characterizations, which consider, for example, refrigeration management and lawn equipment. Our ongoing work on the Illinois TRM Technical Advisory Committee many income-eligible measures.

**Integrated stakeholder engagement.** VEIC manages stakeholder relationships and is a neutral facilitator for multi-party TRM development. Our projects have involved the coordination of 45 annual meetings for technical advisory committees, working groups, and strategic oversight committees—resulting in recommendations supported by robust documentation. We facilitate the Illinois TRM Technical Advisory Committee, which has over 140 stakeholders from regulated DUs, the State Energy Office, regulators, and environmental advocates.

## Program Plans and Annual Reports (#11 in RFQ)

**Commitment to transparency.** We provide the reporting necessary to ensure that State stakeholders have full visibility on performance—including for the transition.

**Regular reporting.** VEIC prepares monthly, quarterly, annual, multi-year, and ad hoc reports for federal agencies, State regulators, utilities, and related advisory boards. These reports document performance to date against benchmarks and contract requirements. They also update energy savings, cost savings, and GHG emissions reductions. They cover year-to-date spending, progress with major market segments, results in underserved communities, program highlights, and changes in implementation plans.

**Accurate and complete.** In each of our PA contracts, independent auditors and third-party evaluation firms validate our reporting on deployment of funding and results compared to budget. To date, all third-party evaluations have affirmed the accuracy of VEIC's methods and assumptions; tracking of installed measures; and calculation of electricity savings, demand reduction, and natural gas savings.

**Responsiveness to regulators.** VEIC provides reports and testimony that meet regulatory needs. Beyond its PA work,<sup>3</sup> VEIC has provided formal testimony on dockets and proposed

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<sup>3</sup> VEIC has special PA expertise in navigating budgets through contested case proceedings.

energy efficiency legislation in California, Iowa, Maine, Maryland, and Vermont. VEIC also provides data and reporting to intervenors and other interested parties, as a regulatory requirement and in response to appropriate requests.

**Thorough and equitable process.** VEIC has created sound processes for long-range planning. Our planning engages communities affected by programming (procedural equity), solicits insights from stakeholder groups, and integrates our knowledge of the market and emerging technologies.

**Evidence-based.** We propose solid, evidence-based plans, tying each initiative or strategy to regulator or other client goals. VEIC uses reports, records, feedback, input, and acquired market knowledge in its development of [annual and three-year plans](#).

**Solid planning, solid outcomes.** If the Three-Year Plan is the roadmap, the Annual Plan provides the point-by-point directions. VEIC's Annual Plans typically offer detailed budgets, savings targets, implementation plans, and outreach strategies. We routinely share drafts with regulators, clients, and advisory groups, incorporating feedback into final plans, and providing them both as detailed documents and summary slide decks.

## Support Centers and Local Staff (#12 in RFQ)

**Supporting our customers.** VEIC's customer care center handles inbound and outbound phone calls, email, and live web chat. The center's Energy Advisors hold technical certification from BPI ([Building Performance Institute](#)) and use utility data to help customers with specific questions. The staff annually field approximately 30,000 calls and online contacts. Additionally, VEIC hires local staff to support program administration both when we are the prime contractor and when we subcontract to another administrator such as we have in Wisconsin (Aptim), Hawaii (Leidos) and California (Energy Solutions). We understand that local presence is needed to support customers with technical and programmatic support.

## Program Transition (#13 in RFQ)

**Transitioning programs.** VEIC has been front and center on effective transitions to PA work, with successful strategies concurrently involving State Energy Offices, PUCs, and utilities. Our two largest PA contracts (Efficiency Vermont and the DCSEU) were competitively bid and involved transitions from current utilities.<sup>4</sup> In both cases, VEIC fulfilled or exceeded regulatory goals and milestones for PA transitions from utility-administered models.

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<sup>4</sup> Among the electric DUs' energy efficiency programs that the Vermont PUC consolidated in 1999, under a [settlement agreement](#), were 2 investor-owned utilities that faced conflicting priorities relating to profits from sales of electricity and State laws mandating investments that would reduce electricity sales. A Memorandum of Understanding from the

We have been team members of program implementer transitions, such as transitioning programs to different implementers for Hawai'i Energy, Wisconsin Focus on Energy, and Efficiency Smart—minimizing market disruptions and bringing beneficial programs to millions of customers and trade allies.

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Vermont Public Service Department established a Transition Working Group and phased out an existing “lost revenue adjustment” for DU activity.