



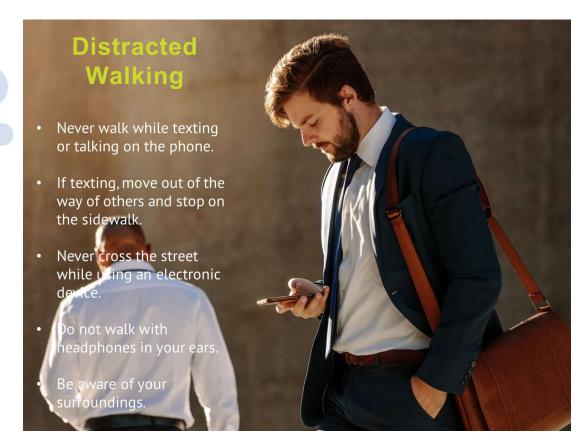


Home Performance with **ENERGY STAR®**

Trade Ally Meeting

October 30, 2019





Safety Message



Agenda

Introductions & Agenda Overview
2019 Review & 2020 Updates
Best Practice Topics
Trade Ally Score Card
Guest Presentations
Green Grant Loan Program
Small Business Presentation
Marketing Overview

Marketing Overview
Awards
Contractor feedback
Closing Thoughts
CU Facility Tour



Welcome and Introductions - DESEU Staff

Tony DePrima

Executive Director

Suzanne Sebastian

Program Manager

Athena Bi

Assistant Program Manager

Lisa Gardner

Office Manager

Mike Williams

Communications Manager





Welcome and Introductions - Franklin Energy

ADMINISTRATIVE

- Joe Gennello, Program Manager
- Traci Evans, Project Coordinator
- Angie Bivens, Marketing & Outreach

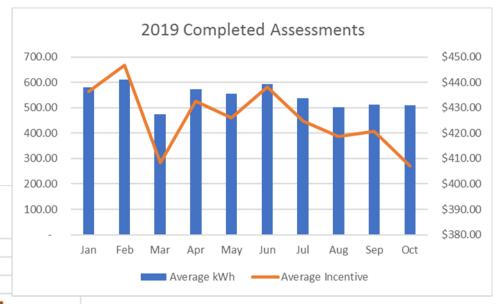
FIELD TEAM

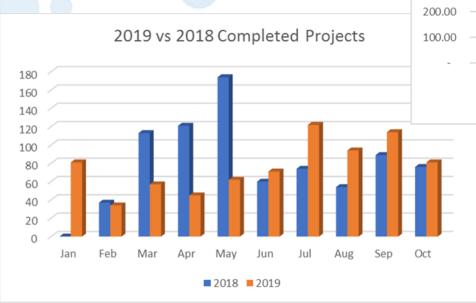
- Gerald (Jerry) Spaulding Jr., Technical Lead
- Daniel McBrien, Energy Advisor
- Krist Matthew, Energy Advisor
- Tyler Tallman, Energy Advisor





2019 Program Overview







2019 Program Overview Key Metrics

Customer Satisfaction

Installation Process	9.6
Customer Service	9.5
Quality of Workmanship	9.6

Average Time to Serve

22.4 Days

Average Project Incentive \$1,502

Aging

2019	Assessment Backlog		
Jan	2		
Feb	1		
Mar	6		
Apr	10		
May	12		
Jun	15		
Jul	14		
Aug	14		
Sep	9		
Oct	66		
Grand Total 149			



	Days to	Days to		
	Process	Pay		
Assessments	2.4	12.7		
Projects	17.8	12.5		
Grand Total	8.6	12.6		



2020 Updates

Contractor Operations Manual Updates

- Minimum required R-value for installing appliances is R20 Homes with R19 and below will require additional insulation or require a pre-approved waiver from Franklin Energy
- Ventilation Requirements The Program will comply with BPI's Building Airflow Standard (BAS)
- Defined program Trade Ally roles
 Primary Contractor & Installation Contractor
- Trade Ally Scorecard More on this later
- Direct Install Measures Key to initial savings, must be documented for both installed and non-installed





2019 Review & 2020 Updates

Contractor Operations Manual Updates

Test Out Requirements

- Customers that receive air sealing and insulation will be provided the new Program Participation Certificate signed by the Inspector following the final test out
 - Includes CFM 50
 - Initial and Final R values

Mini Splits

- HPwES rebate cap \$3,000.00
- AHPwES rebate cap \$4,000.00

Loan Spiff

- \$200 for contractor who initiated the loan
- Loan Spiffs distributed monthly

INSULATION IMPROVEMENTS

| Measures | Auto | Kneeweall | Wall | Manual | Ma

CERTIFICATE OF COMPLETION

Jane Doe 123 Main St Anytown, DE

for completing the

Home Performance with ENERGY STAR® Program

Portable space conditioning appliances are not eligible for rebates

- No window AC units
- No portable space heaters





Best Practice Topics

Communicating Correct and Accurate Information

Trade Ally to Customer

- Review CEAR with the customer make sure they understand the report. Discuss the available incentives
- Maintain communication with the customer and the Installation contractors
- Installation Contractors Provide ample time for primary contractor to complete the assessment
- The test out MAY NOT be the final inspection
- Explain the entire process and review all next steps



Best Practice Topics

Communicating Correct and Accurate Information

Trade Ally to Energize Delaware

- Verify customer information for accuracy prior to submission (Payment mailing address & site address)
- All required documentation must be signed by the homeowner
- Keep open lines of communication with the Franklin Energy Staff





Best Practice Topics

How to maximize rebates and incentives?

Direct Installation Measures should be maximized up to \$200 per assessment. Use multiple LED types to address all savings opportunities.

Rebates are capped at 50% of the total measure cost. Where applicable, breaking down costs into multiple measures can maximize the customer incentive. Air Sealing examples include:

- Foam insulation materials should be categorized as both an air sealing measure and an insulation measure
- Dense packing a wall cavity with insulation will also aid with air sealing

MAXIMIZE



2019 Review & 2020 Updates

IT'S RENEWAL TIME

Contractor Participation Renewal Process

- The CPA & COM must be signed annually and the signature page uploaded.
- All other documents
 (licenses, certifications,
 insurance) must be up-to-date and valid
- Trade specific certifications must be current and on file with the program

For assistance, please contact Traci

302-203-6243 ext 4418

tevans@franklinenergy.com



CERTIFICATIONS AND SIGNATURES					
Contractor Statement and Signature I attest that all of the information entered above is correct to the best of my knowledge. I agree to complete any items noted above for follow-up corrective action and will submit an additional Post-Installation Tests and Inspections Form that verifies the successful completion of those items and records required follow-up tests or inspections.					
Contractor Signature:		Date:			
Customer-Member Statement I attest that I am the owner of the property specified above and that all materials and equipment included in my home improvement contract with the above contractor have been furnished and installed by the contractor, and that the work has been completed pursuant to the contract. I agree that all information is true and that I have conformed to all program energy-efficient improvements and equipment requirements listed.					
Customer-Member Signature: Date:					
SEU will review and process your rebate application upon receipt of this completed test-out form. You can choose to have your rebate paid to your contractor or directly to you. Please check the box (Customer, Contractor) where you would like your rebate sent. Customer Contractor					
Rebate Check Should be Payable to the Following Name/Entity if different from Customer/Contractor Name:					
Mailing Address if Different from Site Address:					
Street:	City:	State:	ZIP:		
XSXX TOX TOX TOX TOX TOX TOX TOX TOX TOX T					

#10 - Confirm where rebate check is to be sent at bottom of test-out form







#8 - Submit project in a timely manner upon receipt of test-out form





#7 - Verifying smart t-stat qualifies



#6 - Include make & model of t-stats on proposal

Sub-Total

Tax

\$17,671.81

\$0.00

Total Due

Payment

\$17,671.81

\$17,671.81

Balance Due \$0.00

#5 - Include paid-in-full receipt in final submission





#4 - Upload all documents in PDF format

	Equipment Information	
	Quantity *	
İ	1	
	New Equipment AFUE Rating *	New Equipment Furnace Input Size (btu) *
	This field is required.	This field is required.
ijai Tiai	New equipment Manufacturer Make *	New Equipment Manufacturer Model *
Line Euro		
ğ	This field is required.	This field is required.
	New Equipment Measure Installed Cost *	New Equipment Serial Number
	This field is required.	

#3 - Verify all HVAC measures are accurately submitted

AHRI CERTIFIED™ www.ahridirectory.org

#2 - Verify system qualifies before submitting for rebate



This combination qualifies for a Federal Energy Efficiency tax Credi placed in service between Feb 17,2009 and Dec 31, 2016.

Certificate of Product Ratings

AHRI Certified Reference Number: 201803329

Date: 09-19-2019

Model Status : Production Stopped

AHRI Type : HRCU-A-CB

Series: PLATINUM XM

Outdoor Unit Brand Name: AMERICAN STANDARD

Outdoor Unit Model Number (Condenser or Single Package): 4A6H7048A1

Indoor Unit Model Number (Evaporator and/or Air Handler): 4PX*CD60BS3

Furnace Model Number: S9V2C100D5PSA

The manufacturer of this AMERICAN STANDARD product is responsible for the rating of this system combination.

Rated as follows in accordance with the latest edition of ANSI/AHRI 210/240 with Addenda 1 and 2, Performance Rating of Unitary

Air-Conditioning & Air-Source Heat Pump Equipment and subject to rating accuracy by AHRI-sponsored, independent, third party testing:

Cooling Capacity (A2) - Single or High Stage (95F), btuh: 48000

SEER: 17.00

EER (A2) - Single or High Stage (95F): 12.50

Heating Capacity (H12) - Single or High Stage (47F): 47500

HSPF (Region IV) : 9.0

#1 - All required AHRIs must be accurate and included in final submission



Trade Ally Scorecard

- Designed to help customers select participating trade allies in the program
- Posted on the Energize Delaware website
- Simple, easily understood criteria based on data collected from assessments and completed projects

PARTICIPATING CONTRACTORS PERFORMANCE SCORES

3 = excellent, 2 = good, 1 = fair.

Contractors	Projects	Customer Service	Work Quality	Timeliness	Overall
	120	***	***	***	***
	50	**	***	***	***
	36	*	**	**	**
	34	**	***	**	**
	34	***	**	**	***
	26	*	***	***	**
	17	*	*	***	**
	13	***	**	*	***
	9	***	**	**	**



HOME PERFORMANCE WITH ENERGY STAR® PROGRAM

- Star rating system in three key areas and an overall score:
 - Customer Service
 - Work Quality
 - Timeliness
- Number of Projects Completed
- Updated Quarterly
- TYD Preview roll-out to Trade Allies now, First web publishing in January



Trade Ally Scorecard Measurement Criteria & Ratings

- Completed Assessments or Projects
- Assessment Time to Serve
- Customer Complaint Rate
- QC Inspection Failure Rate
- Customer Ratings
 - Installation Process Score
 - Customer Service Score
 - Quality Workmanship Score



Voy Massurament	3 Stars		2 Stars		1 Stars	
Key Measurement	Min	Max	Min	Max	Min	Max
Assesment Time to Serve	0	20	20.1	35	35.01	10000
Complaint Rate	0.0%	1.0%	1.1%	2.0%	2.1%	100.0%
Failure Rate	0.0%	1.0%	1.1%	2.0%	2.1%	100.0%
Average Installation Process Score	9	10	7.1	8.99	0	7.99
Average Customer Service Score	9	10	7.1	8.99	0	7.99
Average Quality Workmanship Score	9	10	7.1	8.99	0	7.99



Energy Efficiency Loan Program

Update as of September

- 57 applications totaling \$529,085
- 42 have been completed and paid to contractors totaling \$505,945
- 2 under construction totaling \$23,140
- 12 rejected due to high debt to income ratio
- 2 loan payments are outstanding
- 2 loans have been repaid in full.
- 25 Loan Incentives Paid to Trade Allies Totaling \$4,800



Energy Efficiency Loan Program

COMMON QUESTIONS

- What documents does the contractor need to provide for Part I?
- How long is the approval process?
- What documents does the contractor need to provide for Part II?
- When does the contractor get paid?
- How does the contractor get paid?

Rachel Land InClime, Inc. Greengrantdelaware.com 410-231-3996

rachel.land@inclimesolutions.com

Delaware Division of Small Business

Small business. Big support.





Overall Landscape

- "Small Business" means <100 employees
- 98% of Delaware businesses
- Employ 55% of Delawareans
- 2,600 new jobs annually
- Wages \$9.7 billion a year



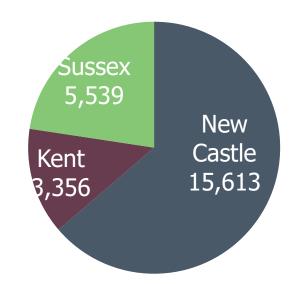


Local Landscape

Largest Industries

Retail Professional Services Health care Construction Other Services Accomodations & Food Finance/Insurance Waste Management Real Estate Wholesale Trade

Small Business by County



*Note – Small businesses account for a larger part of the total economies



Mission Statement

The Division of Small Business is a servicefocused agency committed to helping small businesses start and grow in Delaware.





Regional Business Managers









- "Account managers," serving as end-to-end point of contact
- Services to fit business needs, assisting with:
 - Navigating government processes
 - Connecting with resource organizations
 - Accessing capital
 - Targeting support to MWVBE (e.g. Councils)
- Regionally-focused with staff for each county (and Wilmington)



EDGE Grants





- Program Specifics
 - Up to 10 awards per round
 - \$100,000 or \$50,000
 - STEM and Entrepreneur
 - 5 years old or younger
 - \$3 to \$1 match required
- 10 winners announced in Sept.
- 2nd application round just closed
- Open again in early 2020
- Preparation assistance available



Office of Supplier Diversity







Fewer than US avg.

Woman
Fewer
than US
avg.

Veteran

More
than US
avg.

- Office of Supplier Diversity moved from OMB to Division of Small Business
- Opportunities to expand support for Delaware's MWVBEs



Other Division Units

- Business Finance runs grant, loan and incentive programs
 - Examples:
 - EDGE Grants
 - Angel Investor Tax Credit
 - State Small Business Credit Initiative
 - Workforce Training Program
 - Delaware Strategic Fund
- Delaware Tourism Office
 - Markets state to out-of-state visitors
 - 9 million visitors annually
 - \$3.4 billion industry





The Division on Social

Take a
moment
right now to
follow us!







Contact the Division

- Online
 - Visit www.delbiz.com
 - Fill out contact form, get to right person
- Email
 - business@state.de.us
- Phone
 - Main number 302-739-4271
- Key Staff
 - Damian DeStefano, Director
 - Jordan Schulties, Deputy Director
 - Regina Mitchell, Business Finance Director
 - Liz Keller, Tourism Director
 - Michael Chesney, Communications Director



Thank you! Questions?







Home Performance & Marketing Angie Bivens



Home Performance & Marketing Program Marketing Tools

PROGRAM BROCHURES

- Do not alter or change the brochures and the contents
- Limited quality provided by the program
- To request brochures email <u>DEGeneral@FranklinEnergy.com</u>







Home Performance & Marketing

Program Marketing Tools



Home Performance with ENERGY STAR® Program

After your Home Performance with ENERGY STAR assessment is complete, your program-approved contractor will recommend a variety of energy efficiency improvements for your home that may qualify for significant rebates:

Measure	Home Performance with EMERGY STAR*	Assisted Home Performance & Downtown Development District Relates
Assessment Customer Incentive	75% up to \$300	75% up to \$350
Customer Co-Pay for Assessment	\$100	\$50
Weatherization Measures		
Air Sealing 20% Improvement	\$700	\$800
Air Sealing 30% Improvement	\$950	\$1,50
Air Sealing 40% Improvement	\$1,100	\$1,350
Duct Sealing 20% Improvement	\$500	\$600
Add R-19 Attic Insulation	\$900	\$1,100
Add R-30 Attic Insulation	\$1,000	\$1,200
Knee Walls	\$300	\$500
Rim Joist	\$150	\$200
Floor/Crawlspace Insulation	\$600	\$800
Wall Insulation (min 50% of walls)	\$1,600	\$2,100
HVAC and Water Heating (Measures)		
Heat Pumps Tier 1 (x16 SEER and x12.5 EER and x8.5 HSPF or x2.5 COP)	\$600	\$900
Heat Pumps Tier 2 (±17 SEER and ±12.5 EER and ±9.0 HSPF or ±2.6 COP)	\$800	\$1,200
Mini-Split HP (x17 SEER and x12.5 EER and x 9.0 HSPF or x2.6 COP)	\$400	\$900
Mini-Split HP (±21 SEER and ±12.5 EER and ± 10.0 HSPF or ±2.9 COP)	\$600	\$1,000
CAC Tier 1 (±16 SEER and ±12.5 EER)	\$500	\$900
CAC Tier 2 (x17 SEER and x12.5 EER)	\$650	\$1,000
Furnace Tier 1 (94+AFUE w/ECM)	\$500	\$900
Furnace Tier 2 (96+AFUE w/ECM)	\$650	\$1,000
Boiler (85+AFUE)	\$650	\$1,000
Boiler (90+AFUE)	\$800	\$1,100
Heat Pump Water Heater	\$750	\$900
Tankless Water Heater (Gas/Propane)	\$600	\$800
ENERGY STAR® Certified Smart Thermostat	\$150	\$200
Direct Vent LP/NG Water Heater (±55 gallons: EF ±0.67 & UEF ±0.64 / >55 gallons: EF ±0.67 & UEF ±0.85)	\$100	\$150
Condensing Boiler with On-Demand Hot Water (90+ AFUE)	\$1,000	\$1,200
Mechantical Ventilation Equipment (ERV/HRV/Continuous Exhaust)	\$300	\$500
Hybrid Heat Pump & Furnance System Tier 1 (±16 SEER and ±12.5 EER and ±8.5 HSPF or ±2.5 COP) and [94+AFUE w/ECM]	\$1,000	\$1,200
Hybrid Heat Pump & Furnance System Tier 2 (≥17 SEER and ≥12.5 EER and ≥9.0 HSPF or ≥2.6 COP) and (96-AFUE w/ECM)	\$1,300	\$1,500

Insert Contractor business card here

For more information on rebate eligibility and the reservation process, contact your program-approved contractor or visit

Energipe Delaware: An initiative of the Delaware Sustainable Energy Utilit

EnergizeDelaware.org/Performan

CONTRACTOR LEAVE BEHIND DOCUMENT

- This is intended to be left at the client's home
- The bottom of the document has slots for a Contractor to insert their business card
- Doc is provided by the program
- To request the Leave Behind email <u>DEGeneral@FranklinEnergy.com</u>

Contractor Leave Behind



Home Performance & Marketing

Program Marketing Tools



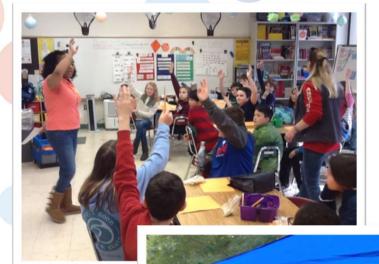
Contractor's Newsletter

- Bi-Monthly e-newsletter
- The newsletter is a way for the program to communicate program updates and events to all the contractors
- To be added to the newsletter mailing list, send an email to DEGeneral@FranklinEnergy.com



Home Performance & Marketing

Program Marketing Tools



Community Outreach Events

- Since the Fall 2018 Present, the program has attended over 30 community related events and workshops
- These events allow the program to teach energy conservation and market the programs



Home Performance & Marketing Advertising Do's & Dont's

USING THE PROGRAM NAME



Do refer to the program as

Energize Delaware's

Home Performance with

ENERGY STAR® Program



Do not refer to the program as

- DE SEU Home Performance...
- Delaware Sustainable Energy Utility's Home Performance...





USING THE PROGRAM LOGO



Do use the Participating Contractor logos:





Do not use any previous logos:





Home Performance & Marketing Advertising Do's & Dont's

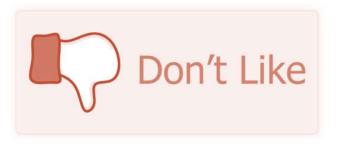
USING THE PROGRAM LOGO



Do use the logos provided in full color or black:







Do not edit the color or text of the logo provided:





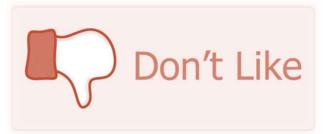
Home Performance & Marketing Advertising Do's & Dont's

USING THE PROGRAM LOGO



Do use the Participating Contractor logo on your company's:

- Website
- Marketing Materials
- Advertisements



Do not use the Participating Contractor logo on your company's:

- Business Cards
- Clothing Apparel (i.e. hats, shirts, badges, etc.)
- Physical Displays (i.e. lawn sings, vehicles or products that are in connection with your company

^{*} Any exceptions must be approved by the Program in writing.





2018 DOE Century Awards *Energize Delaware staff*



Home Performance with ENERGY STA Century Club Award Winner Guidance

Incorrect

- [Company name] is an approved U.S. Department of Energy/U.S. Environment vendor.
- [Company name]'s products/services are certified green by the U.S. Departr Agency/ENERGY STAR program.
- The U.S. Department of Energy/U.S. Environmental Protection Agency/ENE its commitment to excellence.
- The U.S. Department of Energy/U.S. Environmental Protection Agency/ENE [company name] to improve the energy efficiency of your home/business.

Next Steps

- Acquire the Century Club Award mark from your Home Performance with ENE received it
- Add the mark and descriptive text to your marketing materials, including your Book and the ENERGY STAR Web Linking Policy.
- Email homeperformance@energystar.gov with a link to your website meeting
- The Home Performance with ENERGY STAR team will update the website wi meets the ENERGY STAR Web Linking Policy.

Questions

Please direct any questions or comments to homeperformance@energystar.gov.

Home Performance with ENERGY STAR Century Club Award Winner Guidance



Congratulations on your Century Club Award!

The Home Performance with ENERGY STAR Century Club Award recognizes participating contractors who improved the energy efficiency of 100 or more homes in a calendar year. Century Club Award winners will be able to market their award using the Century Club Award mark and by featuring Home Performance with ENERGY STAR on their websites.

Be Featured Online

The Home Performance with ENERGY STAR website will include links to winners' sites that comply with the <u>ENERGY STAR Web Linking Policy</u>. A link from a .gov site such as <u>www.energystar.gov</u> can improve a website's search engine optimization. The policy consists of three requirements:

- Display the Home Performance with ENERGY STAR name and mark. The Century Club Award mark is acceptable.
- Reference or provide a reciprocal link to an ENERGY STAR site. Examples include www.energystar.gov/homeperformance.
- Include a brief description describing your participation in the Home Performance with ENERGY STAR program. For example: [Company name] is proud to work with the [Sponsor's name] Home Performance with ENERGY STAR program in [geographic region] to deliver whole-house energy savings to improve comfort.

If your company meets these requirements send an email to homeperformance@energystar.gov with a link to your website.

Use of the Century Club Award Mark

Every winner has access to Century Club Award marks via their Home Performance with ENERGY STAR Sponsor. Contact your Sponsor with questions about accessing the mark.

USING THE MARK CORRECTLY

This mark is designed to recognize organization-wide leadership; therefore it cannot be used on or near ENERGY STAR certified products, homes, or buildings. This promotional mark highlights what an organization has done to receive the award.

This mark may be used on promotional materials, advertisements, and websites. Winners of this award may use the mark on smaller awards or certificates after receiving approval from Home Performance with ENERGY STAR.

This mark, like all ENERGY STAR marks, must be used in accordance with the ENERGY STAR Brand Book. The mark may not be altered and the proportions of the mark must be maintained in print and online materials. For additional guidance on how to properly use ENERGY STAR marks visit www.energystar.gov/brandbook.

WRITING ABOUT THE AWARD

The following are correct and incorrect examples of describing the Century Club Award.

Correct

- [Company name] has earned/received the Home Performance with ENERGY STAR 2019 Century Club Award.
- [Company name] was awarded the Home Performance with ENERGY STAR Century Club Award for work performed in 2018.
- In 2019, [company name] was recognized by Home Performance with ENERGY STAR as a Century Club Award winner.

ENERGY STAR® is the simple choice for energy efficiency. For more than 20 years, EPA's ENERGY STAR program has been America's resource for saving energy and protecting the environment. Join the millions making a difference at energystar.gov.



2018 DOE Century Award

The Department of Energy Century Club Award recognizes Home Performance with ENERGY STAR contractors that have improved the energy efficiency of more than 100 homes in the past year.

Assessment Trade Ally

- Energy Efficient Earth
- Energy Solutions LLC



Installation Trade Ally

- Burns & McBride Home Comfort
- Maichle's Heating & Air, Inc.



Trade Ally Feedback



- What is Working Well
- What Needs Improvement
- How Can We Reach More Potential Customers
- •How Can We Increase the Energy Savings per Project