



Nebraska Department of Environment & Energy

Solicitation Number: 120003 O5

Egis BLN Consulting USA, LLC

Date: 1.21.2025

TABLE OF CONTENTS

Executive Summary	Page 3
Contractual Agreement Form	Page 4
Terms & Conditions: Sections II thru IV	Page 6
Form A	Page 22
Corporate Overview	Page 24
Bidder Identification & Information	Page 25
Financial Statements.....	Page 25
Change of Ownership	Page 25
Office Location.....	Page 25
Relationships with the State	Page 25
Bidder's Employee Relations to State	Page 25
Contract Performance	Page 25
Summary of Bidder's Corporate Experience.....	Page 26
Experience Narratives.....	Page 26
Summary of Bidder's Proposed Personnel/Management Approach.....	Page 29
Subcontractors	Page 29
Team Member Resumes.....	Page 30
Technical Response.....	Page 57
Understanding of the Project Requirements	Page 58
Proposed Development Approach	Page 58
Technical Requirements.....	Page 58
Detailed Project Work Plan	Page 59
A Proven, Step-by-Step Approach for IRA Rebate Program Design.....	Page 59
Stakeholder Engagement Deliverables	Page 60
Collaborative Approach to Program Design.....	Page 63
Our Methodical & Simplified Approach to Expedite IRA Checklist	Page 68
Value-Added Plans to Operationalize Implementation	Page 86
Maximizing Impact Across Nebraska.....	Page 96
Pilot Projects to Test & Adapt Implementation.....	Page 98
Evaluation, Measurements, & Verification Throughout the Programs' Life Cycle	Page 103
iEnergy - A Simple "One-Stop-Shop" & End-to-End IT Interface to Answer to Data & Tools Requirements.....	Page 105
Deliverables & Due Dates	Page 110



IMAGINE. CREATE. ACHIEVE.
a sustainable future

Nebraska State Purchasing Bureau
1526 K Street, Suite 130
Lincoln, NE 68508

RE: Solicitation No. 120003 O5

Dear Selection Committee:

The Egis Team, comprised of Egis BLN Consulting USA, LLC (Egis), Resource Innovations, and EisnerAmper, is pleased to present our qualifications and approach to the State of Nebraska for the design and implementation of the Inflation Reduction Act (IRA) Home Energy Rebate Programs. The Egis Team provides the following unique benefits, which best position our team to partner with the Nebraska Department of Environmental and Energy (NDEE) on these initiatives.

- 1. National leaders in the design and implementation of IRA Energy Rebate Programs:** the Egis Team provides unparalleled leadership on these programs. We are currently providing program design services for the following states: **Indiana, Ohio, Pennsylvania, Florida, Arizona, and South Carolina**. This experience positions us to streamline program design and accelerate implementation.
- 2. Nationwide and Nebraska-specific energy efficiency program management experience:** the Egis Team has designed and implemented more than 750 efficiency programs throughout the United States (U.S.), including extensive relationships with Omaha Public Power District and MidAmerican Energy within Nebraska since 2006. Our Nebraska-based team will work to design a holistic, efficient, and effective program grounded in proven best practices.
- 3. Exceptional experience with federal fund management:** the Egis Team also provides more than \$40 billion in federal funds managed in recent years. This experience best positions us to reduce federal compliance risks for the NDEE.
- 4. Outstanding local capacity and capabilities to meet Nebraska's needs:** the Egis Team provides extensive Nebraska resources along with national IRA program design specialists to ensure an effective and efficient program design and delivery.
- 5. A thoughtful and collaborative approach to program design:** the Egis Program Design Team prides itself on working collaboratively with our clients to develop a unique program plan that will best serve the state constituents. Our program design methodology is grounded in collaboration, data-driven decision making, risk mitigation, and best positions the state for success.

We look forward to partnering with the State of Nebraska to deliver a statewide energy rebate portfolio.

Sincerely,

Thomas C. Longest
CEO

Jay Cahill
Vice President

Contractual Agreement Form

CONTRACTUAL AGREEMENT FORM**BIDDER MUST COMPLETE THE FOLLOWING**

By signing this Contractual Agreement Form, the bidder guarantees compliance with the provisions stated in this solicitation and agrees to the terms and conditions unless otherwise indicated in writing and certifies that bidder is not owned by the Chinese Communist Party.

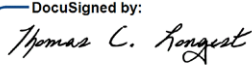
Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603, DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Vendors. This information is for statistical purposes only and will not be considered for contract award purposes.

____ NEBRASKA VENDOR AFFIDAVIT: Bidder hereby attests that bidder is a Nebraska Vendor. "Nebraska Vendor" shall mean any bidder who has maintained a bona fide place of business and at least one employee within this state for at least the six (6) months immediately preceding the posting date of this Solicitation. All vendors who are not a Nebraska Vendor are considered Foreign Vendors under Neb. Rev Stat § 73-603 (c).

____ I hereby certify that I am a Resident disabled veteran or business located in a designated enterprise zone in accordance with Neb. Rev. Stat. § 73-107 and wish to have preference, if applicable, considered in the award of this contract.

____ I hereby certify that I am a blind person licensed by the Commission for the Blind & Visually Impaired in accordance with Neb. Rev. Stat. § 71-8611 and wish to have preference considered in the award of this contract.

THIS FORM MUST BE SIGNED MANUALLY IN INK OR BY DOCUSIGN

COMPANY:	Egis BLN Consulting USA, LLC
ADDRESS:	8320 Craig Street, Indianapolis, IN 46250
PHONE:	317.806.2400
EMAIL:	tom.longest@egis-group.com
BIDDER NAME & TITLE:	Thomas C. Longest, CEO
SIGNATURE:	DocuSigned by: 
DATE:	1/16/2025

**VENDOR COMMUNICATION WITH THE STATE CONTACT INFORMATION
(IF DIFFERENT FROM ABOVE)**

NAME:	Karlei Metcalf
TITLE:	Head of Tender Unit
PHONE:	812.528.1250
EMAIL:	karlei.metcalf@egis-group.com

Terms & Conditions: Sections II thru IV

II. TERMS AND CONDITIONS

Bidder should read the Terms and Conditions within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Terms and Conditions Within Section as Written" in the table below. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken,
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Terms and Conditions Within Section as Written (Initial)	Exceptions Taken to Terms and Conditions Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
TCL		

The bidders should submit with their solicitation response any license, user agreement, service level agreement, or similar documents that the bidder wants incorporated in the Contract. The State will not consider incorporation of any document not submitted with the solicitation response as the document will not have been included in the evaluation process. These documents shall be subject to negotiation and will be incorporated as addendums if agreed to by the Parties.

If a conflict or ambiguity arises after the Addendum to Contract Award has been negotiated and agreed to, the Addendum to Contract Award shall be interpreted as follows:

1. If only one (1) Party has a particular clause, then that clause shall control,
2. If both Parties have a similar clause, but the clauses do not conflict, the clauses shall be read together,
3. If both Parties have a similar clause, but the clauses conflict, the State's clause shall control.

A. GENERAL

1. The contract resulting from this Solicitation shall incorporate the following documents:
 - a. Solicitation, including any attachments and addenda,
 - b. Questions and Answers,
 - c. Bidder's properly submitted solicitation response, including any terms and conditions or agreements submitted by the bidder,
 - d. Addendum to Contract Award (if applicable), and
 - e. Amendments to the Contract. (if applicable)

These documents constitute the entirety of the contract.

Unless otherwise specifically stated in a future contract amendment, in case of any conflict between the incorporated documents, the documents shall govern in the following order of preference with number one (1) receiving preference over all other documents and with each lower numbered document having preference over any higher numbered document: 1) Amendment to the executed Contract with the most recent dated amendment having the highest priority, 2) Executed Contract and any attached Addenda 3) Addendums to the solicitation and any Questions and Answers, 4) the original solicitation document and any Addenda or attachments, and 5) the Vendor's submitted solicitation response, including any terms and conditions or agreements that are accepted by the State.

Unless otherwise specifically agreed to in writing by the State, the State's standard terms and conditions, as executed by the State, shall always control over any terms and conditions or agreements submitted or included by the Vendor.

Any ambiguity or conflict in the contract discovered after its execution, not otherwise addressed herein, shall be resolved in accordance with the rules of contract interpretation as established in the State of Nebraska.

B. NOTIFICATION

Bidder and State shall identify the contract manager who shall serve as the point of contact for the executed contract.

Communications regarding the executed contract shall be in writing and shall be deemed to have been given if delivered personally; electronically, return receipt requested; or mailed, return receipt requested. All notices, requests, or communications shall be deemed effective upon receipt.

Either party may change its address for notification purposes by giving notice of the change and setting forth the new address and an effective date.

C. BUYER'S REPRESENTATIVE

The State reserves the right to appoint a Buyer's Representative to manage or assist the Buyer in managing the contract on behalf of the State. The Buyer's Representative will be appointed in writing, and the appointment document will specify the extent of the Buyer's Representative authority and responsibilities. If a Buyer's Representative is appointed, the bidder will be provided a copy of the appointment document and is expected to cooperate accordingly with the Buyer's Representative. The Buyer's Representative has no authority to bind the State to a contract, amendment, addendum, or other change or addition to the contract.

D. GOVERNING LAW (Nonnegotiable)

Notwithstanding any other provision of this contract, or any amendment or addendum(s) entered into contemporaneously or at a later time, the parties understand and agree that, (1) the State of Nebraska is a sovereign state and its authority to contract is therefore subject to limitation by the State's Constitution, statutes, common law, and regulation; (2) this contract will be interpreted and enforced under the laws of the State of Nebraska; (3) any action to enforce the provisions of this agreement must be brought in the State of Nebraska per state law; (4) the person signing this contract on behalf of the State of Nebraska does not have the authority to waive the State's sovereign immunity, statutes, common law, or regulations; (5) the indemnity, limitation of liability, remedy, and other similar provisions of the final contract, if any, are entered into subject to the State's Constitution, statutes, common law, regulations, and sovereign immunity; and, (6) all terms and conditions of the final contract, including but not limited to the clauses concerning third party use, licenses, warranties, limitations of liability, governing law and venue, usage verification, indemnity, liability, remedy or other similar provisions of the final contract are entered into specifically subject to the State's Constitution, statutes, common law, regulations, and sovereign immunity.

The Parties must comply with all applicable local, state, and federal laws, ordinances, rules, orders, and regulations.

E. BEGINNING OF WORK & SUSPENSION OF SERVICES

The bidder shall not commence any billable work until a valid contract has been fully executed by the State and the successful Vendor. The Vendor will be notified in writing when work may begin.

The State may, at any time and without advance notice, require the Vendor to suspend any or all performance or deliverables provided under this Contract. In the event of such suspension, the Contract Manager or POC, or their designee, will issue a written order to stop work. The written order will specify which activities are to be immediately suspended and the reason(s) for the suspension. Upon receipt of such order, the Vendor shall immediately comply with its terms and take all necessary steps to mitigate and eliminate the incurrence of costs allocable to the work affected by the order during the period of suspension. The suspended performance or deliverables may only resume when the State provides the Vendor with written notice that such performance or deliverables may resume, in whole or in part.

F. AMENDMENT

This Contract may be amended in writing, within scope, upon the agreement of both parties.

G. CHANGE ORDERS OR SUBSTITUTIONS

The State and the Vendor, upon the written agreement, may make changes to the contract within the general scope of the solicitation. Changes may involve specifications, the quantity of work, or such other items as the State may find necessary or desirable. Corrections of any deliverable, service, or work required pursuant to the contract shall not be deemed a change. The Vendor may not claim forfeiture of the contract by reasons of such changes.

The Vendor shall prepare a written description of the work required due to the change and an itemized cost sheet for the change. Changes in work and the amount of compensation to be paid to the Vendor shall be determined in

accordance with applicable unit prices if any, a pro-rated value, or through negotiations. The State shall not incur a price increase for changes that should have been included in the Vendor's solicitation response, were foreseeable, or result from difficulties with or failure of the Vendor's solicitation response or performance.

No change shall be implemented by the Vendor until approved by the State, and the Contract is amended to reflect the change and associated costs, if any. If there is a dispute regarding the cost, but both parties agree that immediate implementation is necessary, the change may be implemented, and cost negotiations may continue with both Parties retaining all remedies under the contract and law.

In the event any good or service is discontinued or replaced upon mutual consent during the contract period or prior to delivery, the State reserves the right to amend the contract to include the alternate product at the same price.

*****Vendor will not substitute any item that has been awarded without prior written approval of SPB*****

H. RECORD OF VENDOR PERFORMANCE

The State may document the vendor's performance, which may include, but is not limited to, the customer service provided by the vendor, the ability of the vendor, the skill of the vendor, and any instance(s) of products or services delivered or performed which fail to meet the terms of the purchase order, contract, and/or specifications. In addition to other remedies and options available to the State, the State may issue one or more notices to the vendor outlining any issues the State has regarding the vendor's performance for a specific contract ("Contract Compliance Request"). The State may also document the Vendor's performance in a report, which may or may not be provided to the vendor ("Contract Non-Compliance Notice"). The Vendor shall respond to any Contract Compliance Request or Contract Non-Compliance Notice in accordance with such notice or request. At the sole discretion of the State, such Contract Compliance Requests and Contract Non-Compliance Notices may be placed in the State's records regarding the vendor and may be considered by the State and held against the vendor in any future contract or award opportunity. The record of vendor performance will be considered in any suspension or debarment action.

I. NOTICE OF POTENTIAL VENDOR BREACH

If Vendor breaches the contract or anticipates breaching the contract, the Vendor shall immediately give written notice to the State. The notice shall explain the breach or potential breach, a proposed cure, and may include a request for a waiver of the breach if so desired. The State may, in its discretion, temporarily or permanently waive the breach. By granting a waiver, the State does not forfeit any rights or remedies to which the State is entitled by law or equity, or pursuant to the provisions of the contract. Failure to give immediate notice, however, may be grounds for denial of any request for a waiver of a breach.

J. BREACH

Either Party may terminate the contract, in whole or in part, if the other Party breaches its duty to perform its obligations under the contract in a timely and proper manner. Termination requires written notice of default and a thirty (30) calendar day (or longer at the non-breaching Party's discretion considering the gravity and nature of the default) cure period. Said notice shall be delivered by email, delivery receipt requested; certified mail, return receipt requested; or in person with proof of delivery. Allowing time to cure a failure or breach of contract does not waive the right to immediately terminate the contract for the same or different contract breach which may occur at a different time.

The State's failure to make payment shall not be a breach, and the Vendor shall retain all available statutory remedies. (See Indemnity - Self-Insurance and Payment)

K. NON-WAIVER OF BREACH

The acceptance of late performance with or without objection or reservation by a Party shall not waive any rights of the Party nor constitute a waiver of the requirement of timely performance of any obligations remaining to be performed.

L. SEVERABILITY

If any term or condition of the contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and conditions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the contract did not contain the provision held to be invalid or illegal.

M. INDEMNIFICATION

1. GENERAL

The Vendor agrees to defend, indemnify, and hold harmless the State and its employees, volunteers, agents, and its elected and appointed officials ("the indemnified parties") from and against any and all third party claims, liens, demands, damages, liability, actions, causes of action, losses, judgments, costs, and expenses of every nature, including investigation costs and expenses, settlement costs, and attorney fees and

expenses ("the claims"), sustained or asserted against the State for personal injury, death, or property loss or damage, arising out of, resulting from, or attributable to the willful misconduct, negligence, error, or omission of the Vendor, its employees, Subcontractors, consultants, representatives, and agents, resulting from this contract, except to the extent such Vendor liability is attenuated by any action of the State which directly and proximately contributed to the claims.

2. INTELLECTUAL PROPERTY

The Vendor agrees it will, at its sole cost and expense, defend, indemnify, and hold harmless the indemnified parties from and against any and all claims, to the extent such claims arise out of, result from, or are attributable to, the actual or alleged infringement or misappropriation of any patent, copyright, trade secret, trademark, or confidential information of any third party by the Vendor or its employees, Subcontractors, consultants, representatives, and agents; provided, however, the State gives the Vendor prompt notice in writing of the claim. The Vendor may not settle any infringement claim that will affect the State's use of the Licensed Software without the State's prior written consent, which consent may be withheld for any reason.

If a judgment or settlement is obtained or reasonably anticipated against the State's use of any intellectual property for which the Vendor has indemnified the State, the Vendor shall, at the Vendor's sole cost and expense, promptly modify the item or items which were determined to be infringing, acquire a license or licenses on the State's behalf to provide the necessary rights to the State to eliminate the infringement, or provide the State with a non-infringing substitute that provides the State the same functionality. At the State's election, the actual or anticipated judgment may be treated as a breach of warranty by the Vendor, and the State may receive the remedies provided under this Solicitation.

3. PERSONNEL

The Vendor shall, at its expense, indemnify and hold harmless the indemnified parties from and against any claim with respect to withholding taxes, worker's compensation, employee benefits, or any other claim, demand, liability, damage, or loss of any nature relating to any of the personnel, including subcontractor's and their employees, provided by the Vendor.

4. SELF-INSURANCE

The State of Nebraska is self-insured for any loss and purchases excess insurance coverage pursuant to Neb. Rev. Stat. § 81-8,239.01. If there is a presumed loss under the provisions of this agreement, Vendor may file a claim with the Office of Risk Management pursuant to Neb. Rev. Stat. §§ 81-8,239.01 to 81-8,306 for review by the State Claims Board. The State retains all rights and immunities under the State Miscellaneous (Neb. Rev. Stat. § 81-8,294), Tort (Neb. Rev. Stat. § 81-8,209), and Contract Claim Acts (Neb. Rev. Stat. § 81-8,302), as outlined in state law and accepts liability under this agreement only to the extent provided by law.

5. ALL REMEDIES AT LAW

Nothing in this agreement shall be construed as an indemnification by one Party of the other for liabilities of a Party or third parties for property loss or damage or death or personal injury arising out of and during the performance of this contract. Any liabilities or claims for property loss or damages or for death or personal injury by a Party or its agents, employees, Vendors or assigns or by third persons, shall be determined according to applicable law.

- 6.** The Parties acknowledge that Attorney General for the State of Nebraska is required by statute to represent the legal interests of the State, and that any provision of this indemnity clause is subject to the statutory authority of the Attorney General.

N. ATTORNEY'S FEES

In the event of any litigation, appeal, or other legal action to enforce any provision of the contract, the Parties agree to pay all expenses of such action, as permitted by law and if ordered by the court, including attorney's fees and costs, if the other Party prevails.

O. ASSIGNMENT, SALE, OR MERGER

Either Party may assign the contract upon mutual written agreement of the other Party. Such agreement shall not be unreasonably withheld.

The Vendor retains the right to enter into a sale, merger, acquisition, internal reorganization, or similar transaction involving Vendor's business. Vendor agrees to cooperate with the State in executing amendments to the contract to allow for the transaction. If a third party or entity is involved in the transaction, the Vendor will remain responsible for performance of the contract until such time as the person or entity involved in the transaction agrees in writing to be contractually bound by this contract and perform all obligations of the contract.

P. CONTRACTING WITH OTHER NEBRASKA POLITICAL SUBDIVISIONS OF THE STATE OR ANOTHER STATE
The Vendor may, but shall not be required to, allow agencies, as defined in Neb. Rev. Stat. § 81-145(2), to use this contract. The terms and conditions, including price, of the contract may not be amended. The State shall not be contractually obligated or liable for any contract entered into pursuant to this clause. A listing of Nebraska political subdivisions may be found at the website of the Nebraska Auditor of Public Accounts.

The Vendor may, but shall not be required to, allow other states, agencies or divisions of other states, or political subdivisions of other states to use this contract. The terms and conditions, including price, of this contract shall apply to any such contract, but may be amended upon mutual consent of the Parties. The State of Nebraska shall not be contractually or otherwise obligated or liable under any contract entered into pursuant to this clause. The State shall be notified if a contract is executed based upon this contract.

Q. FORCE MAJEURE
Neither Party shall be liable for any costs or damages, or for default resulting from its inability to perform any of its obligations under the contract due to a natural or manmade event outside the control and not the fault of the affected Party ("Force Majeure Event") that was not foreseeable at the time the Contract was executed. The Party so affected shall immediately make a written request for relief to the other Party and shall have the burden of proof to justify the request. The other Party may grant the relief requested; relief may not be unreasonably withheld. Labor disputes with the impacted Party's own employees will not be considered a Force Majeure Event.

R. CONFIDENTIALITY
All materials and information provided by the Parties or acquired by a Party on behalf of the other Party shall be regarded as confidential information. All materials and information provided or acquired shall be handled in accordance with federal and state law, and ethical standards. Should said confidentiality be breached by a Party, the Party shall notify the other Party immediately of said breach and take immediate corrective action.

It is incumbent upon the Parties to inform their officers and employees of the penalties for improper disclosure imposed by the Privacy Act of 1974, 5 U.S.C. 552a. Specifically, 5 U.S.C. 552a (i)(1), which is made applicable by 5 U.S.C. 552a (m)(1), provides that any officer or employee, who by virtue of his/her employment or official position has possession of or access to agency records which contain individually identifiable information, the disclosure of which is prohibited by the Privacy Act or regulations established thereunder, and who knowing that disclosure of the specific material is prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than \$5,000.

S. EARLY TERMINATION
The contract may be terminated as follows:

1. The State and the Vendor, by mutual written agreement, may terminate the contract, in whole or in part, at any time.
2. The State, in its sole discretion, may terminate the contract, in whole or in part, for any reason upon thirty (30) calendar day's written notice shall be delivered by email, delivery receipt requested; certified mail, return receipt requested; or in person with proof of delivery to the Vendor. Such termination shall not relieve the Vendor of warranty or other service obligations incurred under the terms of the contract. In the event of termination, the Vendor shall be entitled to payment, determined on a pro rata basis, for products or services satisfactorily performed or provided.
3. The State may terminate the contract, in whole or in part, immediately for the following reasons:
 - a. if directed to do so by statute,
 - b. Vendor has made an assignment for the benefit of creditors, has admitted in writing its inability to pay debts as they mature, or has ceased operating in the normal course of business,
 - c. a trustee or receiver of the Vendor or of any substantial part of the Vendor's assets has been appointed by a court,
 - d. fraud, misappropriation, embezzlement, malfeasance, misfeasance, or illegal conduct pertaining to performance under the contract by its Vendor, its employees, officers, directors, or shareholders,
 - e. an involuntary proceeding has been commenced by any Party against the Vendor under any one of the chapters of Title 11 of the United States Code and (i) the proceeding has been pending for at least sixty (60) calendar days; or (ii) the Vendor has consented, either expressly or by operation of law, to the entry of an order for relief; or (iii) the Vendor has been decreed or adjudged a debtor,
 - f. a voluntary petition has been filed by the Vendor under any of the chapters of Title 11 of the United States Code,
 - g. Vendor intentionally discloses confidential information,
 - h. Vendor has or announces it will discontinue support of the deliverable; and,
 - i. In the event funding is no longer available.

T. CONTRACT CLOSEOUT

Upon termination of the contract for any reason the Vendor shall within thirty (30) days, unless stated otherwise herein:

1. Transfer all completed or partially completed deliverables to the State,
2. Transfer ownership and title to all completed or partially completed deliverables to the State,
3. Return to the State all information and data unless the Vendor is permitted to keep the information or data by contract or rule of law. Vendor may retain one copy of any information or data as required to comply with applicable work product documentation standards or as are automatically retained in the course of Vendor's routine back up procedures,
4. Cooperate with any successor Contactor, person, or entity in the assumption of any or all of the obligations of this contract,
5. Cooperate with any successor Contactor, person, or entity with the transfer of information or data related to this contract,
6. Return or vacate any state owned real or personal property; and,
7. Return all data in a mutually acceptable format and manner.

Nothing in this section should be construed to require the Vendor to surrender intellectual property, real or personal property, or information or data owned by the Vendor for which the State has no legal claim.

U. AMERICANS WITH DISABILITIES ACT

Vendor shall comply with all applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12131–12134), as amended by the ADA Amendments Act of 2008 (ADA Amendments Act) (Pub.L. 110–325, 122 Stat. 3553 (2008)), which prohibits discrimination on the basis of disability by public entities.

V. CERTIFICATION REGARDING LOBBYING

The undersigned agrees that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including sub-contracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

III. VENDOR DUTIES

Bidder should read the Vendor Duties within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Vendor Duties Within Section as Written" in the table below. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken,
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Vendor Duties Within Section as Written (Initial)	Exceptions Taken to Vendor Duties Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
TCL		

A. INDEPENDENT VENDOR / OBLIGATIONS

It is agreed that the Vendor is an independent Vendor and that nothing contained herein is intended or should be construed as creating or establishing a relationship of employment, agency, or a partnership.

The Vendor is solely responsible for fulfilling the contract. The Vendor or the Vendor's representative shall be the sole point of contact regarding all contractual matters.

The Vendor shall secure, at its own expense, all personnel required to perform the services under the contract. The personnel the Vendor uses to fulfill the contract shall have no contractual or other legal relationship with the State; they shall not be considered employees of the State and shall not be entitled to any compensation, rights or benefits from the State, including but not limited to, tenure rights, medical and hospital care, sick and vacation leave, severance pay, or retirement benefits.

By-name personnel commitments made in the bidder's solicitation response shall not be changed without the prior written approval of the State. Replacement of these personnel, if approved by the State, shall be with personnel of equal or greater ability and qualifications.

All personnel assigned by the Vendor to the contract shall be employees of the Vendor or a subcontractor and shall be fully qualified to perform the work required herein. Personnel employed by the Vendor or a subcontractor to fulfill the terms of the contract shall remain under the sole direction and control of the Vendor or the subcontractor respectively.

With respect to its employees, the Vendor agrees to be solely responsible for the following:

1. Any and all pay, benefits, and employment taxes and/or other payroll withholding,
2. Any and all vehicles used by the Vendor's employees, including all insurance required by state law,
3. Damages incurred by Vendor's employees within the scope of their duties under the contract,
4. Maintaining Workers' Compensation and health insurance that complies with state and federal law and submitting any reports on such insurance to the extent required by governing law,
5. Determining the hours to be worked and the duties to be performed by the Vendor's employees; and,
6. All claims on behalf of any person arising out of employment or alleged employment (including without limit claims of discrimination alleged against the Vendor, its officers, agents, or subcontractors or subcontractor's employees).

If the Vendor intends to utilize any subcontractor, the subcontractor's level of effort, tasks, and time allocation should be clearly defined in the solicitation response. The Vendor shall agree that it will not utilize any subcontractors not specifically included in its solicitation response in the performance of the contract without the prior written authorization of the State. If the Vendor subcontracts any of the work, the Vendor agrees to pay any and all subcontractors in accordance with the Vendor's agreement with the respective subcontractor(s).

The State reserves the right to require the Vendor to reassign or remove from the project any Vendor or subcontractor employee.

Vendor shall insure that the terms and conditions contained in any contract with a subcontractor does not conflict with the terms and conditions of this contract.

The Vendor shall include a similar provision, for the protection of the State, in the contract with any Subcontractor engaged to perform work on this contract.

B. FOREIGN ADVERSARY CONTRACTING PROHIBITION ACT CERTIFICATION (Nonnegotiable)

The Vendor certifies that it is not a scrutinized company as defined under the Foreign Adversary Contracting Prohibition Act, Neb. Rev. Stat. Sec. § 73-903 (5); that it will not subcontract with any scrutinized company for any aspect of performance of the contemplated contract; and that any products or services to be provided do not originate with a scrutinized company.

C. EMPLOYEE WORK ELIGIBILITY STATUS

The Vendor is required and hereby agrees to use a federal immigration verification system to determine the work eligibility status of employees physically performing services within the State of Nebraska. A federal immigration verification system means the electronic verification of the work authorization program authorized by the Illegal Immigration Reform and Immigrant Responsibility Act of 1996, 8 U.S.C. 1324a, known as the E-Verify Program, or an equivalent federal program designated by the United States Department of Homeland Security or other federal agency authorized to verify the work eligibility status of an employee.

If the Vendor is an individual or sole proprietorship, the following applies:

1. The Vendor must complete the United States Citizenship Attestation Form, available on the Department of Administrative Services website at <https://das.nebraska.gov/materiel/docs/pdf/Individual%20or%20Sole%20Proprietor%20United%20States%20Attestation%20Form%20English%20and%20Spanish.pdf>
2. The completed United States Attestation Form should be submitted with the Solicitation response.
3. If the Vendor indicates on such attestation form that he or she is a qualified alien, the Vendor agrees to provide the US Citizenship and Immigration Services documentation required to verify the Vendor's lawful presence in the United States using the Systematic Alien Verification for Entitlements (SAVE) Program.
4. The Vendor understands and agrees that lawful presence in the United States is required, and the Vendor may be disqualified or the contract terminated if such lawful presence cannot be verified as required by Neb. Rev. Stat. § 4-108.

D. FEDERAL TAX LIABILITY

With signature on the Contract, the Contractor certifies that they: (1) are not subject to any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an Contract with the authority responsible for collecting the tax liability, and (2) have not been convicted (or had an officer or agent acting on its behalf convicted) of a felony criminal conviction under any Federal law within 24 months preceding the award, unless DOE has considered suspension or debarment of the corporation, or such officer or agent, based on these tax liabilities or convictions and determined that such action is not necessary to protect the Government's interests.

E. COMPLIANCE WITH CIVIL RIGHTS LAWS AND EQUAL OPPORTUNITY EMPLOYMENT / NONDISCRIMINATION (Nonnegotiable)

The Vendor shall comply with all applicable local, state, and federal statutes and regulations regarding civil rights laws and equal opportunity employment. The Nebraska Fair Employment Practice Act prohibits Vendors of the State of Nebraska, and their Subcontractors, from discriminating against any employee or applicant for employment, with respect to hire, tenure, terms, conditions, compensation, or privileges of employment because of race, color, religion, sex, disability, marital status, or national origin (Neb. Rev. Stat. §§ 48-1101 to 48-1125). The Vendor guarantees compliance with the Nebraska Fair Employment Practice Act, and breach of this provision shall be regarded as a material breach of contract. The Vendor shall insert a similar provision in all Subcontracts for goods and services to be covered by any contract resulting from this Solicitation.

F. COOPERATION WITH OTHER VENDORS

Vendor may be required to work with or in close proximity to other Vendors or individuals that may be working on same or different projects. The Vendor shall agree to cooperate with such other Vendors or individuals and shall not commit or permit any act which may interfere with the performance of work by any other Vendor or individual. Vendor is not required to compromise Vendor's intellectual property or proprietary information unless expressly required to do so by this contract.

G. DISCOUNTS

Prices quoted shall be inclusive of ALL trade discounts. Cash discount terms of less than thirty (30) days will not be considered as part of the solicitation response. Cash discount periods will be computed from the date of receipt of a properly executed claim voucher or the date of completion of delivery of all items in a satisfactory condition, whichever is later.

H. PRICES

Prices quoted shall be net, including transportation and delivery charges fully prepaid by the bidder, F.O.B. destination named in the Solicitation. No additional charges will be allowed for packing, packages, or partial delivery costs. When an arithmetic error has been made in the extended total, the unit price will govern.

NDEE is interested in understanding type and level of costs for the proposed program design and implementation decisions that significantly impact cost. The Bidder shall:

1. Submit a Pricing Schedule and associated budget in the format provided in Attachment - Cost Sheet. Populate the "Deliverables/Tasks" column to include deliverables/tasks involved in achieving the milestone listed in the corresponding "Milestone" column, with the exception of those rows that are already populated with Deliverables/Tasks.
2. In addition to populating the Cost Sheet, describe program design decisions that significantly impact total cost to deliver Part IV: Program Implementation.

NDEE understands that pricing will depend in part on program design decisions that are yet to be made and requests pricing schedules reflecting the overall approach outlined in the proposal for illustrative purposes.

Prices submitted on the cost sheet form, once accepted by the State, shall remain fixed for the first twelve months of the contract. Any request for a price increase subsequent to the first twelve months of the contract shall not exceed 25% of the price proposed for the period. Increases shall not be cumulative and will only apply to that period of the contract. The request for a price increase must be submitted in writing to the State Purchasing Bureau a minimum of 120 days prior to the end of the current contract period. Documentation may be required by the State to support the price increase.

This funding amount does not include the programmatic funding for home energy rebates that the Contractor will deliver to eligible recipients. Note funding availability for the Contractor is contingent upon successful submission of Application and continuation application documents through which NDEE will secure tranches of funding for the Home Energy Rebate Programs.

Per Exhibit B - Administrative and Legal Requirements Document (ALRD), costs must be allowable, allocable, and reasonable in accordance with the applicable Federal cost principles referenced in 2 CFR 200. The cost principles for commercial organizations are in Federal Acquisition Regulation (FAR) Part 31. (Under 2 CFR Part 200 as amended by 2 CFR Part 910 regulations, the cost principles are contained in Subpart E—Cost Principles within 2 CFR Part 200.) Rebates issued under these awards are not federal public benefits.

The State reserves the right to deny any requested price increase. No price increases are to be billed to any State Agencies prior to written amendment of the contract by the parties.

The State will be given full proportionate benefit of any decreases for the term of the contract.

I. PERMITS, REGULATIONS, LAWS

The contract price shall include the cost of all royalties, licenses, permits, and approvals, whether arising from patents, trademarks, copyrights or otherwise, that are in any way involved in the contract. The Vendor shall obtain and pay for all royalties, licenses, and permits, and approvals necessary for the execution of the contract. The Vendor must guarantee that it has the full legal right to the materials, supplies, equipment, software, and other items used to execute this contract.

J. OWNERSHIP OF INFORMATION AND DATA / DELIVERABLES

The State shall have the unlimited right to publish, duplicate, use, and disclose all information and data developed or obtained by the Vendor on behalf of the State pursuant to this contract.

The State shall own and hold exclusive title to any deliverable developed as a result of this contract. Vendor shall have no ownership interest or title, and shall not patent, license, or copyright, duplicate, transfer, sell, or exchange, the design, specifications, concept, or deliverable.

K. INSURANCE REQUIREMENTS

The Vendor shall throughout the term of the contract maintain insurance as specified herein and provide the State a current Certificate of Insurance/Acord Form (COI) verifying the coverage. The Vendor shall not commence work on the contract until the insurance is in place. If Vendor subcontracts any portion of the Contract the Vendor must, throughout the term of the contract, either:

1. Provide equivalent insurance for each subcontractor and provide a COI verifying the coverage for the subcontractor,
2. Require each subcontractor to have equivalent insurance and provide written notice to the State that the Vendor has verified that each subcontractor has the required coverage; or,
3. Provide the State with copies of each subcontractor's Certificate of Insurance evidencing the required coverage.

The Vendor shall not allow any Subcontractor to commence work until the Subcontractor has equivalent insurance. The failure of the State to require a COI, or the failure of the Vendor to provide a COI or require subcontractor insurance shall not limit, relieve, or decrease the liability of the Vendor hereunder.

In the event that any policy written on a claims-made basis terminates or is canceled during the term of the contract or within one (1) year of termination or expiration of the contract, the Vendor shall obtain an extended discovery or reporting period, or a new insurance policy, providing coverage required by this contract for the term of the contract and one (1) year following termination or expiration of the contract.

If by the terms of any insurance a mandatory deductible is required, or if the Vendor elects to increase the mandatory deductible amount, the Vendor shall be responsible for payment of the amount of the deductible in the event of a paid claim.

Notwithstanding any other clause in this Contract, the State may recover up to the liability limits of the insurance policies required herein.

1. WORKERS' COMPENSATION INSURANCE

The Vendor shall take out and maintain during the life of this contract the statutory Workers' Compensation and Employer's Liability Insurance for all of the contactors' employees to be engaged in work on the project under this contract and, in case any such work is sublet, the Vendor shall require the Subcontractor similarly to provide Worker's Compensation and Employer's Liability Insurance for all of the Subcontractor's employees to be engaged in such work. This policy shall be written to meet the statutory requirements for the state in which the work is to be performed, including Occupational Disease. **The policy shall include a waiver of subrogation in favor of the State. The COI shall contain the mandatory COI subrogation waiver language found hereinafter.** The amounts of such insurance shall not be less than the limits stated hereinafter. For employees working in the State of Nebraska, the policy must be written by an entity authorized by the State of Nebraska Department of Insurance to write Workers' Compensation and Employer's Liability Insurance for Nebraska employees.

2. COMMERCIAL GENERAL LIABILITY INSURANCE AND COMMERCIAL AUTOMOBILE LIABILITY INSURANCE

The Vendor shall take out and maintain during the life of this contract such Commercial General Liability Insurance and Commercial Automobile Liability Insurance as shall protect Vendor and any Subcontractor performing work covered by this contract from claims for damages for bodily injury, including death, as well as from claims for property damage, which may arise from operations under this contract, whether such operation be by the Vendor or by any Subcontractor or by anyone directly or indirectly employed by either of them, and the amounts of such insurance shall not be less than limits stated hereinafter.

The Commercial General Liability Insurance shall be written on an **occurrence basis**, and provide Premises/Operations, Products/Completed Operations, Independent Vendors, Personal Injury, and Contractual Liability coverage. **The policy shall include the State, and others as required by the contract documents, as Additional Insured(s). This policy shall be primary, and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory. The COI shall contain the mandatory COI liability waiver language found hereinafter.** The Commercial Automobile Liability Insurance shall be written to cover all Owned, Non-owned, and Hired vehicles.

REQUIRED INSURANCE COVERAGE	
COMMERCIAL GENERAL LIABILITY	
General Aggregate	\$2,000,000
Products/Completed Operations Aggregate	\$2,000,000
Personal/Advertising Injury	\$1,000,000 per occurrence
Bodily Injury/Property Damage	\$1,000,000 per occurrence
Medical Payments	\$10,000 any one person
Damage to Rented Premises (Fire)	\$300,000 each occurrence
Contractual	Included
XCU Liability (Explosion, Collapse, and Underground Damage)	Included
Independent Vendors	Included
Abuse & Molestation	Included
<i>If higher limits are required, the Umbrella/Excess Liability limits are allowed to satisfy the higher limit.</i>	
WORKER'S COMPENSATION	
Employers Liability Limits	\$500K/\$500K/\$500K
Statutory Limits- All States	Statutory - State of Nebraska
Voluntary Compensation	Statutory
COMMERCIAL AUTOMOBILE LIABILITY	
Bodily Injury/Property Damage	\$1,000,000 combined single limit
Include All Owned, Hired & Non-Owned Automobile liability	Included
Motor Carrier Act Endorsement	Where Applicable
UMBRELLA/EXCESS LIABILITY	
Over Primary Insurance	\$5,000,000 per occurrence
PROFESSIONAL LIABILITY	
All Other Professional Liability (Errors & Omissions)	\$1,000,000 Per Claim / Aggregate
COMMERCIAL CRIME	
Crime/Employee Dishonesty Including 3rd Party Fidelity	\$1,000,000
CYBER LIABILITY	
Breach of Privacy, Security Breach, Denial of Service, Remediation, Fines and Penalties	\$5,000,000
MANDATORY COI SUBROGATION WAIVER LANGUAGE	
"Workers' Compensation policy shall include a waiver of subrogation in favor of the State of Nebraska."	
MANDATORY COI LIABILITY WAIVER LANGUAGE	
"Commercial General Liability & Commercial Automobile Liability policies shall name the State of Nebraska as an Additional Insured and the policies shall be primary and any insurance or self-insurance carried by the State shall be considered secondary and non-contributory as additionally insured."	

3. EVIDENCE OF COVERAGE

The Vendor shall furnish the Contract Manager, via email, with a certificate of insurance coverage complying with the above requirements prior to beginning work at:

Agency: Nebraska Department of Environment and Energy
 Attn: NDEE c/o Aaron Miller
 RFP: 120003 O5
 245 Fallbrook Avenue, Suite 100
 Lincoln NE, 68521
 Email: aaron.miller@nebraska.gov

These certificates or the cover sheet shall reference the solicitation number, and the certificates shall include the name of the company, policy numbers, effective dates, dates of expiration, and amounts and types of coverage afforded. If the State is damaged by the failure of the Vendor to maintain such insurance, then the Vendor shall be responsible for all reasonable costs properly attributable thereto.

Reasonable notice of cancellation of any required insurance policy must be submitted to the contract manager as listed above when issued and a new coverage binder shall be submitted immediately to ensure no break in coverage.

4. DEVIATIONS

The insurance requirements are subject to limited negotiation. Negotiation typically includes, but is not necessarily limited to, the correct type of coverage, necessity for Workers' Compensation, and the type of automobile coverage carried by the Vendor.

L. ANTITRUST

The Vendor hereby assigns to the State any and all claims for overcharges as to goods and/or services provided in connection with this contract resulting from antitrust violations which arise under antitrust laws of the United States and the antitrust laws of the State.

M. CONFLICT OF INTEREST

By submitting a solicitation response, vendor certifies that no relationship exists between the vendor and any person or entity which either is, or gives the appearance of, a conflict of interest related to this solicitation or project.

Vendor further certifies that vendor will not employ any individual known by vendor to have a conflict of interest nor shall vendor take any action or acquire any interest, either directly or indirectly, which will conflict in any manner or degree with the performance of its contractual obligations hereunder or which creates an actual or appearance of conflict of interest.

If there is an actual or perceived conflict of interest, vendor shall provide with its solicitation response a full disclosure of the facts describing such actual or perceived conflict of interest and a proposed mitigation plan for consideration. The State will then consider such disclosure and proposed mitigation plan and either approve or reject as part of the overall solicitation response evaluation.

N. STATE PROPERTY

The Vendor shall be responsible for the proper care and custody of any State-owned property which is furnished for the Vendor's use during the performance of the contract. The Vendor shall reimburse the State for any loss or damage of such property; normal wear and tear is expected.

O. SITE RULES AND REGULATIONS

The Vendor shall use its best efforts to ensure that its employees, agents, and Subcontractors comply with site rules and regulations while on State premises. If the Vendor must perform on-site work outside of the daily operational hours set forth by the State, it must make arrangements with the State to ensure access to the facility and the equipment has been arranged. No additional payment will be made by the State on the basis of lack of access, unless the State fails to provide access as agreed to in writing between the State and the Vendor.

P. ADVERTISING

The Vendor agrees not to refer to the contract award in advertising in such a manner as to state or imply that the company or its goods or services are endorsed or preferred by the State. Any publicity releases pertaining to the project shall not be issued without prior written approval from the State.

Q. NEBRASKA TECHNOLOGY ACCESS STANDARDS (Nonnegotiable)

1. The State of Nebraska is committed to ensuring that all information and communication technology (ICT), developed, leased, or owned by the State of Nebraska, affords equivalent access to employees, program participants and members of the public with disabilities, as it affords to employees, program participants and members of the public who are not persons with disabilities.
2. By entering into this Contract, Vendor understands and agrees that if the Vendor is providing a product or service that contains ICT, as defined in subsection 3 below and such ICT is intended to be directly interacted with by the user or is public facing, such ICT must provide equivalent access, or be modified during implementation to afford equivalent access, to employees, program participants, and members of the public who have and who do not have disabilities. The Vendor may comply with this section by complying with Section 508 of the Rehabilitation Act of 1973, as amended, and its implementing standards adopted and promulgated by the U.S. Access Board.
3. ICT means information technology and other equipment, systems, technologies, or processes, for which the principal function is the creation, manipulation, storage, display, receipt, or transmission of electronic data and information, as well as any associated content. Vendor hereby agrees ICT includes computers and peripheral equipment, information kiosks and transaction machines, telecommunications equipment, customer premises equipment, multifunction office machines, software, applications, web sites, videos, and electronic documents. For the purposes of these assurances, ICT does not include ICT that is used exclusively by a Vendor.

R. DISASTER RECOVERY/BACK UP PLAN

The Vendor shall have a disaster recovery and back-up plan, of which a copy should be provided upon request to the State, which includes, but is not limited to equipment, personnel, facilities, and transportation, in order to continue delivery of goods and services as specified under the specifications in the contract in the event of a disaster.

S. DRUG POLICY

Vendor certifies it maintains a drug free workplace environment to ensure worker safety and workplace integrity. Vendor agrees to provide a copy of its drug free workplace policy at any time upon request by the State.

T. WARRANTY

Despite any clause to the contrary, the Vendor represents and warrants that its services hereunder shall be performed by competent personnel and shall be of professional quality consistent with generally accepted industry standards for the performance of such services and shall comply in all respects with the requirements of this Agreement. For any breach of this warranty, the Vendor shall, for a period of ninety (90) days from performance of the service, perform the services again, at no cost to the State, or if Vendor is unable to perform the services as warranted, Vendor shall reimburse the State all fees paid to Vendor for the unsatisfactory services. The rights and remedies of the parties under this warranty are in addition to any other rights and remedies of the parties provided by law or equity, including, without limitation actual damages, and, as applicable and awarded under the law, to a prevailing party, reasonable attorneys' fees and costs.

U. TIME IS OF THE ESSENCE

Time is of the essence with respect to Vendor's performance and deliverables pursuant to this Contract.

IV. PAYMENT

Bidder should read the Payment clauses within this section and must initial either "Accept All Terms and Conditions Within Section as Written" or "Exceptions Taken to Payment clauses Within Section as Written" in the table below. If the bidder takes any exceptions, they must provide the following within the "Exceptions" field of the table below (Bidder may provide responses in separate attachment if multiple exceptions are taken):

1. The specific clause, including section reference, to which an exception has been taken,
2. An explanation of why the bidder took exception to the clause; and
3. Provide alternative language to the specific clause within the solicitation response.

By signing the solicitation, bidder agrees to be legally bound by all the accepted terms and conditions, and any proposed alternative terms and conditions submitted with the solicitation response. The State reserves the right to negotiate rejected or proposed alternative language. If the State and bidder fail to agree on the final Terms and Conditions, the State reserves the right to reject the solicitation response. The State reserves the right to reject solicitation responses that attempt to substitute the bidder's commercial contracts and/or documents for this solicitation.

Accept All Payment Clauses Within Section as Written (Initial)	Exceptions Taken to Payment Clauses Within Section as Written (Initial)	Exceptions: (Bidder must note the specific clause, including section reference, to which an exception has been taken, an explanation of why the bidder took exception to the clause, and provide alternative language to the specific clause within the solicitation response.)
TCL		

A. PROHIBITION AGAINST ADVANCE PAYMENT (Nonnegotiable)

Pursuant to Neb. Rev. Stat. § 81-2403, "[n]o goods or services shall be deemed to be received by an agency until all such goods or services are completely delivered and finally accepted by the agency."

B. TAXES (Nonnegotiable)

The State is not required to pay taxes and assumes no such liability as a result of this Solicitation. The Vendor may request a copy of the Nebraska Department of Revenue, Nebraska Resale or Exempt Sale Certificate for Sales Tax Exemption, Form 13 for their records. Any property tax payable on the Vendor's equipment which may be installed in a state-owned facility is the responsibility of the Vendor.

C. INVOICES

Invoices for payments must be submitted by the Vendor to the agency requesting the services with sufficient detail to support payment. Invoices shall be submitted no more than monthly to ndee.accounting@nebraska.gov. Invoices shall include the contract number and a summary of activities completed, including performance metrics, as described in the contract, for the contract period. The terms and conditions included in the Vendor's invoice shall be deemed to be solely for the convenience of the parties. No terms or conditions of any such invoice shall be binding upon the State, and no action by the State, including without limitation the payment of any such invoice in whole or in part, shall be construed as binding or estopping the State with respect to any such term or condition, unless the invoice term or condition has been previously agreed to by the State as an amendment to the contract. **The State shall have forty-five (45) calendar days to pay after a valid and accurate invoice is received by the State.** NDEE will work with the Contractor to set up an expedited, sub-30-day reimbursement process for rebate payments.

D. INSPECTION AND APPROVAL

Final inspection and approval of all work required under the contract shall be performed by the designated State officials.

The State and/or its authorized representatives shall have the right to enter any premises where the Vendor or Subcontractor duties under the contract are being performed, and to inspect, monitor or otherwise evaluate the work being performed. All inspections and evaluations shall be at reasonable times and in a manner that will not unreasonably delay work.

E. PAYMENT (Nonnegotiable)

Payment will be made by the responsible agency in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. § 81-2403). The State may require the Vendor to accept payment by electronic means such as ACH deposit. In no event shall the State be responsible or liable to pay for any goods and services provided by the Vendor prior to the Effective Date of the contract, and the Vendor hereby waives any claim or cause of action for any such goods or services.

F. LATE PAYMENT (Nonnegotiable)

The Vendor may charge the responsible agency interest for late payment in compliance with the State of Nebraska Prompt Payment Act (See Neb. Rev. Stat. §§ 81-2401 through 81-2408).

G. SUBJECT TO FUNDING / FUNDING OUT CLAUSE FOR LOSS OF APPROPRIATIONS (Nonnegotiable)

The State's obligation to pay amounts due on the Contract for fiscal years following the current fiscal year is contingent upon legislative appropriation of funds. Should said funds not be appropriated, the State may terminate the contract with respect to those payments for the fiscal year(s) for which such funds are not appropriated. The State will give the Vendor written notice thirty (30) calendar days prior to the effective date of termination. All obligations of the State to make payments after the termination date will cease. The Vendor shall be entitled to receive just and equitable compensation for any authorized work which has been satisfactorily completed as of the termination date. In no event shall the Vendor be paid for a loss of anticipated profit.

H. RIGHT TO AUDIT (First Paragraph is Nonnegotiable)

The State shall have the right to audit the Vendor's performance of this contract upon a thirty (30) days' written notice. Vendor shall utilize generally accepted accounting principles, and shall maintain the accounting records, and other records and information relevant to the contract (Information) to enable the State to audit the contract. (Neb. Rev. Stat. § 84-304 et seq.) The State may audit, and the Vendor shall maintain, the Information during the term of the contract and for a period of five (5) years after the completion of this contract or until all issues or litigation are resolved, whichever is later. The Vendor shall make the Information available to the State at Vendor's place of business or a location acceptable to both Parties during normal business hours. If this is not practical or the Vendor so elects, the Vendor may provide electronic or paper copies of the Information. The State reserves the right to examine, make copies of, and take notes on any Information relevant to this contract, regardless of the form or the Information, how it is stored, or who possesses the Information. Under no circumstance will the Vendor be required to create or maintain documents not kept in the ordinary course of Vendor's business operations, nor will Vendor be required to disclose any information, including but not limited to product cost data, which is confidential or proprietary to Vendor.

The Parties shall pay their own costs of the audit unless the audit finds a previously undisclosed overpayment by the State. If a previously undisclosed overpayment exceeds three percent (3%) of the total contract billings, or if fraud, material misrepresentations, or non-performance is discovered on the part of the Vendor, the Vendor shall reimburse the State for the total costs of the audit. Overpayments and audit costs owed to the State shall be paid within ninety (90) days of written notice of the claim. The Vendor agrees to correct any material weaknesses or condition found as a result of the audit.

Form A

Form A
Bidder Proposal Point of Contact
Request for Proposal Number 120003 05

Form A should be completed and submitted with each response to this Request for Proposal. This is intended to provide the State with information on the bidder's name and address, and the specific person(s) who are responsible for preparation of the bidder's response.

Preparation of Response Contact Information	
Bidder Name:	Egis BLN Consulting USA, LLC
Bidder Address:	8320 Craig Street, Indianapolis, IN 46250
Contact Person & Title:	Karlei Metcalf, Head of Tender Unit
E-mail Address:	karlei.metcalf@egis-group.com
Telephone Number (Office):	317.806.3019
Telephone Number (Cellular):	812.528.1250
Fax Number:	N/A

Each bidder should also designate a specific contact person who will be responsible for responding to the State if any clarifications of the bidder's response should become necessary. This will also be the person who the State contacts to set up a presentation/demonstration, if required.

Communication with the State Contact Information	
Bidder Name:	Egis BLN Consulting USA, LLC
Bidder Address:	8320 Craig Street, Indianapolis, IN 46250
Contact Person & Title:	Karlei Metcalf, Head of Tender Unit
E-mail Address:	karlei.metcalf@egis-group.com
Telephone Number (Office):	317.806.3019
Telephone Number (Cellular):	812.528.1250
Fax Number:	N/A

Corporate Overview

CORPORATE OVERVIEW

Bidder Identification & Information

Full Company Name:

Egis BLN Consulting USA, LLC

State Incorporated:

Indiana

Company Headquarters Address:

8320 Craig Street, Indianapolis, IN 46250

Year First Organized to Do Business:

2017

Entity Organization:

Limited Liability Corporation

Name and Form of Organization Change:

Egis BLN Consulting USA, LLC was formerly known as BLN Emergency Management, LLC. The form of the organization did not change.

Financial Statements

Please see file 120003 05 Egis BLN Consulting USA, LLC File 4 of 5 for a copy of Egis BLN Consulting USA, LLC's financial statements.

Change of Ownership

Egis BLN Consulting USA, LLC does not anticipate a change in ownership in the 12 months following the solicitation response due date of 1/21/2025.

Office Location

Based upon our extensive experience designing and implementing these IRA Rebate Programs, we would have a multifaceted approach inclusive of close collaboration with the client, establishment of various field offices, and tapping into the experience and subject matter expertise of our team from across the country.

Relationships with the State

Egis BLN Consulting USA, LLC and our subconsultant team has not had any dealings or contracts with the State of Nebraska in the last five years.

Bidder's Employee Relations to State

Egis BLN Consulting USA, LLC and our subconsultant team does not have any team members who is/has been an employee of the State of Nebraska within the past five months.

Contract Performance

Egis BLN Consulting USA, LLC and our subconsultant team has not had any contracts terminated in the last five years.

Summary of Bidder's Corporate Experience

Project Name	Client	Location	Allocation	Similarity to Nebraska Home Energy Rebates		
				Size	Scope	Complexity
Indiana Home Energy Rebates Program	Indiana Office of Energy Development (IOED)	Indiana	\$182 million	X	X	X
Ohio Home Energy Rebates Program	Ohio Office of Energy Efficiency (OEE), Department of Development (DOD)	Ohio	\$249 million	X	X	X
Arizona Home Energy Rebates Program	Arizona Governor's Office of Resiliency	Arizona	\$153 million	X	X	X
Pennsylvania Home Energy Rebate Program - Section 50122	Pennsylvania Department of Environmental Protection	Pennsylvania	\$129 million	X	X	X

Experience Narratives

Our team provides the State of Nebraska with two decades of unparalleled experience in designing and implementing multifaceted marketing and education strategies honed through the hundreds of energy rebate and individual assistance programs administered nationally to facilitate broad awareness and participation in these programs. More importantly, we offer the NDEE unmatched expertise in crafting and executing comprehensive community engagement plans throughout Nebraska. We will apply industry best practices and our unique understanding of the people and communities of the State of Nebraska to best position the agency for maximum awareness and participation in these rebate programs.

Program Management Experience: *50 years of extensive experience in energy rebate programs*

The Egis Team brings unparalleled experience designing and implementing projects with multiple similarities to Nebraska's home energy rebate programs scopes, including:

- Program design and management
- Client coordination and communication
- Public outreach (paid and earned media)
- Stakeholder outreach and coordination
- Residential inspections and audits
- Energy efficiency
- Data tracking and reporting
- Anti-fraud, waste, and abuse
- Off-the-shelf, purpose-built IT solution
- Program compliance and reporting
- Workforce development and job creation
- Quality control/quality assurance (QC/QA)
- Reimbursement program and processing
- Braided funding
- Contractor coordination and oversight
- Contract administration and federal project close-out
- Program recipient engagement and support
- Call centers
- Categorical eligibility

Outlined on the following pages is information regarding three programs we have administered or are currently managing.

Indiana Home Energy Rebate Programs

IOED | 2024 - Present | Prime Vendor

The Egis Team is collaboratively working with the IOED on the design, development, and implementation of their IRA Home Energy Rebate Programs (Sections 50121 & 50122). Having participated in the U.S. DOE's Sprint Cohort #2, we completed the entirety of the Indiana program narrative checklists within 40 days of the Notice to Proceed. Additionally, we have completed nearly 35% of their program implementation blueprints with an anticipated program launch date of October 2024.

Client Objectives

Achieve Energy & Demand Savings in Existing Income-Qualified Homes

- Provide a simple process to install energy-efficient equipment
- Ensure bill neutrality or better to maximize impact and cost savings for Indiana residents

Targeted Marketing & Workforce Development

- Comprehensive, multifaceted statewide outreach strategy to encourage participation by residents and Indiana-based contractors
- Training and job creation strategies to expand the local energy auditor

Reference

Julie Kempf, Director, IOED

317.954.2868 | jkempf@oed.in.gov

Ohio Home Energy Rebate Programs

OEE DOD | 2024 - Present | Prime Vendor

The Egis Team is providing a turnkey solution for the DOD in designing, developing, and implementing its IRA Home Energy Rebate Programs. We recently completed the program Checklist and have begun developing the Implementation Blueprint. Our structured and collaborative planning process is on track to launch the programs in the State's desired time frame of early 2025.

Client Objectives

Achieve Energy & Demand Savings in Existing Income-Qualified Homes

- Installation of energy-efficient equipment and appliances to reduce demand
- Provide direct financial savings to participants in an expedited manner

Targeted Marketing & Workforce Development

- Statewide partnerships with education and training institutions to expand job opportunities in the energy industry
- Training and job creation strategies to expand the local energy auditor and contractor networks

Reference

Luke Stedke, Assistant Chief, Community Investments, Ohio Department of Development

614.203.9140 | luke.stedke@development.ohio.gov



Key Features:

- Total allocation: \$182 million
- Blueprints completed in 40 days
- U.S. DOE Spring Cohort 2

Scheduled Completion Date: 2028

Actual Completion Date: Ongoing



**Department of
Development**

Home Energy Savings

Key Features:

- Total allocation: \$249 million
- Launch in early 2025

Scheduled Completion Date: 2031

Actual Completion Date: Ongoing

Income Qualified Energy Rebate Program

NicorGas | 2018 - 2022 | Prime Vendor

Resource Innovations, Inc.

In 2018, Resource Innovations worked with Nicor Gas to expand our current income-qualified program beyond the CAA channel we were using. With experience designing and implementing similar programs across the country, Resource Innovations proposed the most effective solutions and strategies for Nicor Gas to deploy a contractor-driven income-qualified program.

The result is a program that allows Nicor Gas to provide more personalized experiences for customers to support more comprehensive customer journeys. To increase program effectiveness, we planned to track milestones quarterly to allow for increased flexibility and adjust incentives to ensure comprehensive goal achievement across multifamily and single-family customers.

In 2020, the contractor channel delivered 542,265 therm savings to 474 homes and nearly 4,500 multifamily units. With the success of this program element, it was fully rolled into the program design for the next program cycle launched in 2022.

Reference

Mike King, Manager, Program Operations

630.388.2378 | mking@southernco.com



Nicor Gas

Key Features:

- 542,265 therm savings
- 474 homes
- 4,500 multi-family units
-

Scheduled Completion Date: 2022

Actual Completion Date: 2022

Budget: Confidential

Summary of Bidder's Proposed Personnel/Management Approach

Having designed and delivered over **750 energy rebate programs** and compliantly administered **more than \$40 billion in federal funding**, we provide industry-leading experts to partner with Nebraska. Our program team offers more than 300 years of collective experience, which best positions the state for success. In addition to the key staff identified below, our team includes industry leaders who bring extensive expertise in federally funded projects, engineering, accounting, and energy market transformation.



NDEE Project Manager



****Resumes for our team members can be found starting on page 30.**

Subcontractors

Resource Innovations, Inc.

Address:	1025 Cannon Street, Suite 200, Louisville, CO 80027
Telephone Number:	802.598.5467
Specific Tasks for Each Subcontractor:	RI will provide technical assistance in program design, staff augmentation for implementation, as well as software.
Percentage of Performance Hours Intended:	25%

EisnerAmper

Address:	8550 United Plaza Blvd., Suite 1001, Baton Rouge, LA 70809
Telephone Number:	225.456.6065
Specific Tasks for Each Subcontractor:	EisnerAmper will provide payment processing and AFWA.
Percentage of Performance Hours Intended:	12%

Total Percentage of Subcontractor(s) Performance Hours: 37%

Jay CAHILL

Principal in Charge

Jay's expertise is in assisting public and private sector clients with designing and implementing complex programs and providing project management to ensure projects are delivered on time and within budget. His ability to promptly identify and address any scheduling, processes, and cost-related challenges has proven to be a valuable asset on every project. Jay excels at leading multifaceted teams, engaging stakeholders, providing turnkey solutions and subject matter expertise, and maximizing job creation and contracting opportunities. His extensive program experience includes COVID-19 (CARES, CRRSA, ARPA, Emergency Rental Assistance Program), as well as general FEMA, HUD, and Department of the Treasury.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebate Programs, IOED

Jay is responsible for providing executive leadership and program oversight to the IOED for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Indiana, with at least 40% of the funding focused on homes in disadvantaged or low-income communities.

IRA Home Energy Rebate Programs, OEE, DOD

Jay is responsible for providing executive leadership and program oversight to the OEE for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebate (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Ohio, with at least 40% of the funding focused on homes in disadvantaged or low-income communities.

Homeowner Assistance Fund (HAF), U.S. Treasury, State of Indiana Housing & Community Development Authority

Jay was the Principal in Charge for the \$167 million ARPA-funded mortgage assistance program that expedited the implementation and disbursement of funding to community members most in need. Overall, the team provided a turnkey solution addressing transparency, accountability, compliance, and software security goals. Scope of services included the accelerated design and implementation of a simple yet compliant program involving a tailored software solution that successfully organized and streamlined program components, case management, intake, eligibility review, application verification, fund distribution, reporting, compliance, treasury reporting, and community engagement.

Indiana Public Assistance Consulting Assistance, State of Indiana

Jay was the Principal in Charge for the consulting services and subject matter expertise provided to the State of Indiana related to COVID-19 pandemic impacts under FEMA's Public Assistance program, totaling almost \$2 million. He oversaw team coordination with over 1,300 schools.

YEARS OF EXPERIENCE: 20

EDUCATION:

BS, Political Science,
Loyola University

CERTIFICATIONS & LICENSES:

Crime Prevention through
Environmental Design (CPTED)
Certified Practitioner

STATES WORKED IN:

- ✓ Indiana
- ✓ Puerto Rico
- ✓ Louisiana
- ✓ Michigan
- ✓ Arizona
- ✓ Colorado
- ✓ Wyoming
- ✓ New Mexico
- ✓ Alabama

Services included topical research, advice based upon experience and subject-matter expertise, evaluation and qualification of an applicant under the Public Assistance Recovery program, review, research, and investigation of identified projects for red expenditures, progress reports, and records management, leading to the submission of applicant projects for reimbursement under the grant.

Gordie Howe International Bridge, Michigan Department of Transportation (MDOT)

As the Senior Technical Advisor for the Gordie Howe International Bridge Demolition Program, Jay developed and implemented a plan to maximize DBE and small business participation, assisted in the development and implementation of technical specifications for demolition services, and developed deconstruction standards and processes for MDOT adoption. He brought awareness of job opportunities to the community and focused on maximizing job creation and contracting opportunities for DBEs and small businesses, including segmenting and sizing contracts to maximize participation. Jay was involved with developing environmental guidelines for hazardous materials and streamlining the asbestos sampling and reporting procedures. He worked closely with MDOT to finalize contractor engagement strategies while coordinating with multiple agencies. As part of the demolition process, Jay coordinated with utilities to accelerate the disconnect process, identify substantial cost savings for the project, and assist in developing security strategies to control costs. Furthermore, he was a liaison between the acquisition and demolition teams. He verified work performed within the footprint was sensitive to the area's remaining businesses and residents yet delivered cost-effectively and efficiently.

REFERENCES

Julie Kempf, Director, IOED

317.954.2868

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

Luke Stedke, Assistant Chief, Community Investments, Ohio DOD

614.203.9140

77 South High Street, 29th Floor, Columbus, OH 43215

Rich Harcourt, Chief Financial Officer, IHCD

317.233.0928

30 S Meridian St., Indianapolis, IN 46204

EXTENSIVE EXPERIENCE IN:

- > Program design and management
- > Federally funded grant management and administration
- > Multi-agency coordination
- > Federally funded program compliance
- > Client and contractor coordination
- > Stakeholder engagement and coordination
- > Project delivery life-cycle
- > Quality control and quality assurance
- > Maximizing DBE and small business participation
- > Strategy and road-mapping
- > Financial management

Mark OPELKA

Project Manager Implementation Lead

Mark excels in program and project management, including contract administration, program/project design and implementation, scheduling and invoicing, database and process innovation, and production oversight. He has extensive experience in federally funded disaster response and recovery programs, with expertise in reviewing federal program guidelines and designing and ensuring compliance with multi-million dollar programs. Mark manages subcontractors, coordinates large teams, and develops the local workforce. He prioritizes the client's needs and ensures compliance with program requirements through his excellent relationship-building skills.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebate Programs, IOED

Mark provides executive leadership and program oversight to the IOED for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Indiana, with at least 40% of the funding focused on homes in disadvantaged or low-income communities.

IRA Home Energy Rebate Programs, OEE, DOD

Mark provides executive leadership and program oversight to the OEE for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebate (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Ohio, with at least 40% of the funding focused on homes in disadvantaged or low-income communities.

Home Repair, Reconstruction & Relocation (R3), Puerto Rico Department of Housing

Mark was the Field Inspections and Contractor Invoicing Manager for this \$3+ billion HUD CDBG-DR funded home building and repair program. He designed and drafted the program's home inspection protocols, trained inspectors to perform HUD-compliant home inspections, managed the contractor progress inspection workflow, and led contractor invoicing and payments. Mark implemented compliant processes that met the requirements of regular HUD monitoring visits and representatives of the Inspector General. The team working for Mark was comprised of local hires who received on-the-job training for vocations they had not previously been exposed to. This local workforce development assisted Puerto Rico in managing its own future federal funding programs more efficiently and effectively.

Tu Hogar Renance STEP Program, Puerto Rico Department of Housing

Mark was the Operations and Invoicing Manager responsible for the management and leadership of a multi-faceted team of over 500 staff members. These teams included call center representatives, case managers, QC/QA specialists, contractor liaisons, field inspectors, and contractor invoicing analysts. Teams led by Mark efficiently managed the repair of 108,000

YEARS OF EXPERIENCE: 15

EDUCATION:

BA, Sociology,
Louisiana State University

STATES WORKED IN:

- ✓ Indiana
- ✓ Puerto Rico
- ✓ Louisiana
- ✓ Michigan
- ✓ Arizona

homes across Puerto Rico in an expedited timeline of 16 months. Mark and his team's effective policy design and quality controls allowed the team to manage nearly \$2 billion dollars worth of contractor invoices successfully and compliantly. The team closed out the program with zero findings from the Inspector General. Ninety percent of the team working for Mark comprised local employees who received training in legacy skills, including call center customer service, process analysis, construction inspections, and financial controls.

HAF, U.S. Treasury, IHCD

Mark was the Senior Technical Advisor responsible for the \$167 million ARPA-funded mortgage assistance program that expedited the implementation and disbursement of funding to community members most in need. Overall, the team provided a turnkey solution addressing the goals of transparency, accountability, compliance, and software security. Scope of services included the accelerated design and implementation of a simple, yet compliant, program. This involved a tailored software solution that successfully organized and streamlined program components, case management, intake, eligibility review, application verification, fund distribution, reporting, compliance, treasury reporting, and community engagement. Mark assisted the client in writing its HAF plan to the U.S. Treasury and managed the question-and-answer phase of plan approval alongside the State's representative. This thoughtful program design before public launch guaranteed quick program deployment, federal compliance, and that at-risk communities received federal assistance quickly. Due to this collaborative program design process tied to effective program management, the U.S. Treasury has named the State and our team the model program to be used by all 50 U.S. States.

REFERENCES

Julie Kempf, Director, IOED

317.954.2868

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

Luke Stedke, Assistant Chief, Community Investments, Ohio DOD

614.203.9140

77 South High Street, 29th Floor, Columbus, OH 43215

Rich Harcourt, Chief Financial Officer, IHCD

317.233.0928

30 S Meridian St., Indianapolis, IN 46204

EXTENSIVE EXPERIENCE IN:

- > Development and management of program portfolio
- > Program design and management
- > Federally funded grant management and administration
- > Multi-agency coordination
- > Federally funded program compliance
- > Client and contractor coordination
- > Stakeholder engagement and communication
- > Project delivery life-cycle
- > Quality control and quality assurance
- > Program close-out
- > Workforce development and training

Ron SHAW

Deputy Project Manager Planning Lead

Ron brings 20 years of leadership and expertise in the design, implementation, and evaluation of energy rebate programs throughout the United States, including major programs in California, Indiana, Kentucky, New York, North and South Carolina, Ohio, and Wisconsin. His focus on client needs and attention to detail has helped him lead complex, multifaceted teams focused on residential and income-qualified/low-to-moderate income programs and ensure these programs are delivered on schedule with measurable results. He can develop and implement impact evaluation plans, measure and quantify verified energy, and calculate demand savings with statistical sampling models. Ron grounds his approach to program design in efficiency and ease of customer experience. He understands all facets of program delivery, thus enabling accelerated design and subsequent program deployment.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebate Programs, IOED

Ron provides subject matter expertise, leadership, and program management services to the IOED for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs.

IRA Home Energy Rebate Programs, OEE, DOD

Ron provides subject matter expertise, leadership, and program management services to the OEE for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs.

Planning and Analysis, Multiple Clients: Wisconsin Focus on Energy, Consolidated Edison (New York), Duke Energy (Ohio, Indiana, Kentucky, North/South Carolina & Progress), Ontario Independent System Operator & Southern California Edison

Ron provides leadership and expertise on evaluation projects that involve establishing evaluation objectives and plans and performing statistical sampling and probability analysis, measurement and verification (M&V), emissions calculations, cost-benefit analysis, and quality assurance. He defines baseline scenarios, conducts meter studies, calculates energy and demand savings, performs utility bill analyses, and creates deemed savings estimations. He also manages data collection activities necessary for the residential modeling as part of his impact evaluations. Ron conducts research to understand technical and qualitative characteristics of a specific or broad market and performs on-site inspections, logistics coordination, customer telephone surveys, and market actor interviews.

Evaluation of the Consumer Incentive Programs, Independent Electricity System Operator (IESO)

Ron provided daily project management and technical guidance for the impact evaluation of

YEARS OF EXPERIENCE: 20

EDUCATION:

BS, Chemical Engineering,
University of Colorado at Boulder

CERTIFICATIONS & LICENSES:

Association of Energy
Engineers (AEE)

STATES WORKED IN:

- ✓ California
- ✓ Indiana
- ✓ Kentucky
- ✓ New York
- ✓ North Carolina
- ✓ Ohio
- ✓ South Carolina
- ✓ Wisconsin

IESO's Consumer Products Heating & Cooling Incentives, Appliance Exchange, and Appliance Retirement programs. This evaluation included verifying the gross and net energy and demand impacts, reviewing program input assumptions, and assessing the cost-effectiveness.

Energy Efficiency Program Evaluation, Elizabethtown Gas

Ron managed the impact evaluation of Elizabethtown Gas' commercial and residential energy efficiency program. This evaluation employed utility bill regression analyses and reviews of per-input assumptions. The impact evaluation provided recommendations on deemed savings values, savings algorithms, and assumptions in order to make the program-reported savings more accurate and robust.

REFERENCES

Julie Kempf, Director, IOED

317.954.2868

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

Patrick Smith, Chief, Community Services Division, Ohio DOD

380.222.0111

77 South High Street, 29th Floor, Columbus, OH 43215

Jean Williams, Manager, Evaluation, Measurement, and Verification - Duke Energy

919.623.2321

410 S Wilmington Street, NCRH7, Raleigh, NC 27601

EXTENSIVE EXPERIENCE IN:

- > Program evaluation, measurement, and verification
- > Market characterization studies
- > Conservation planning and program design
- > Program design and management
- > Modeled vs. measured
- > Data analysis and reporting

Trent BRACKENRIDGE

Senior Technical Advisor

Trent is a seasoned leader with a track record of success in managing nationwide teams for energy rebate and incentive programs. With a focus on client satisfaction and delivery excellence, he oversees program performance and goal achievement for various clients across North America. Trent's expertise extends to enhancing customer experience, where he successfully expanded teams, improved residential solar project delivery, and implemented organizational and technological enhancements to elevate homeowner satisfaction. In program delivery, he has led the implementation of multi-million-dollar portfolios across 12 western states, overseeing large delivery teams and achieving notable results in market share improvement, contract renewals, and strategic initiatives. Trent's leadership spans start-up to mature phases, ensuring top-tier execution of contracts and high levels of client satisfaction.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebate Programs, IOED

Trent provides subject matter expertise, leadership, and program management services to the IOED for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs.

IRA Home Energy Rebate Programs, OEE, DOD

Trent provides subject matter expertise, leadership, and program management services to the OEE for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs.

Program Operations Executive Leadership, Various Clients: ComEd (Illinois), Dominion Virginia & Pacific Gas & Electric (California)

Trent is responsible for managing a nationwide team of energy rebate and incentive program delivery personnel who deliver tailored programs and solutions for utilities across North America. He tracks performance and goal achievement of our portfolio of programs. He also helps secure resources from across the organization to ensure client satisfaction and delivery of contracted commitments.

Customer Experience, Various Clients: California, Colorado, Florida, Illinois, Indiana & Ohio

Trent successfully managed and expanded a team from 30 to 100 employees, focusing on improving customer experience and ensuring on-time delivery of over 20,000 residential solar projects in 2022. He introduced and executed organizational, process, and technological enhancements to elevate homeowner satisfaction and increase the Net Promoter Score (NPS) for solar installations. Trent implemented new recruitment and interview procedures, reducing time-to-hire by two weeks. He identified process optimizations that reduced project cycle times by approximately 10% and introduced management metrics, resulting in a 50% improvement in NPS scores for Q4 2021 and Q1 2022.

YEARS OF EXPERIENCE: 15

EDUCATION:

MBA, Baylor University

BS, Agriculture Economics,
University of Missouri

STATES WORKED IN:

- ✓ Arizona
- ✓ California
- ✓ Colorado
- ✓ Florida
- ✓ Idaho
- ✓ Illinois
- ✓ Nevada
- ✓ New Mexico
- ✓ Ohio
- ✓ Oklahoma
- ✓ Oregon
- ✓ Texas
- ✓ Utah
- ✓ Washington
- ✓ Wyoming

Program Delivery, Various Clients: Arizona, California, Colorado, Idaho, Nevada, New Mexico, Oklahoma, Oregon, Texas, Utah, Washington & Wyoming

Trent led the implementation of a multi-million-dollar program portfolio across 12 western states, overseeing a 250-person delivery team. He managed resources between growth-focused initiatives and existing client deliveries, developing strategies and solutions for highly regulated utility clients. Trent successfully turned around the northwest/west region by building an effective team of regional directors, improving market share, and boosting contract renewal rates. His initiatives improved rebate and call center resolution rates, increased gross margin by over 1% annually, integrated multiple acquisitions, achieved 100% contract renewal rates in 2016, 2018, and 2019, and led regional strategy in new markets, EV, grid storage, and carbon reduction.

REFERENCES

Julie Kempf, Director, IOED

317.954.2868

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

Patrick Smith, Chief, Community Services Division, Ohio DOD

380.222.0111

77 South High Street, 29th Floor, Columbus, OH 43215

Gino Porazzo, CEO, Assuricare

303.618.9200

100 5th Ave. Suite 4010, Waltham, MA 02451

EXTENSIVE EXPERIENCE IN:

- > Program and project management
- > Client coordination and relationships
- > Personnel development and management
- > Project portfolio management
- > Project management solutions
- > Strategy

Jodi GOLDEN

Cost-Share & Braiding Specialist & Risk Mitigation Lead

Jodi is a seasoned professional with a wealth of experience in public administration and managing federal and state programs and grants for diverse governmental agencies. Her broad skillset encompasses strategic planning, policy analysis, overseeing statewide capital programs, coordinating state and federal funds, developing and administering assistance programs, leading marketing and outreach efforts, ensuring fiscal stewardship, driving community development initiatives, and expertly managing grant administration. Throughout her career, Jodi has held key leadership positions within multiple government agencies, where she provided comprehensive program oversight, managed substantial budgets in the multi-million-dollar range, and effectively engaged stakeholders across different tiers of government and community-based organizations.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebate Programs, IOED

Jodi provides executive leadership and program oversight to the IOED for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Indiana, with at least 40% of the funding focused on homes in disadvantaged or low-income communities.

IRA Home Energy Rebate Programs, OEE, DOD

Jodi provides executive leadership and program oversight to the OEE for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebate (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Ohio, with at least 40% of the funding focused on homes in disadvantaged or low-income communities.

Executive Leadership, State of Indiana & Illinois

Jodi has served in multiple leadership positions within the executive branch of government in both Indiana & Illinois. As Chief of Staff/Chief of Agency Operations for Lieutenant Governor Crouch, Jodi oversaw, collaborated, and strategically advised four state agencies (ISDA, OCRA, IHCD, and IDDC) along with the Indiana Broadband Office on policy and core mission objectives. She was a senior advisor to the Lt. Governor on policy, legislation, staffing, and scheduling matters. Jodi analyzed and oversaw multi-million-dollar executive office and state agency budgets, including implementing severe budget cuts due to the COVID-19 health pandemic. She managed executive and state agency active responses to the COVID-19 health pandemic, including agency distribution of over \$1 billion in pandemic relief programmatic dollars through the Coronavirus Aid, Relief, and Economic Security Act and American Rescue Plan. Additionally, Jodi supervised and assisted with developing Indiana's first-ever broadband grant program and Renters and Mortgage Assistance Programs.

YEARS OF EXPERIENCE: 16

EDUCATION:

MPA, Public Administration,
Southern Illinois University

BS, Speech Communication,
Southern Illinois University

STATES WORKED IN:

- ✓ Indiana
- ✓ Illinois

Federal Funding & Compliance Management, State of Indiana

As the State Infrastructure Administrator, Jodi was responsible for identifying, analyzing, and prioritizing funding opportunities from the Infrastructure Investment and Jobs Act, IRA, American Rescue Plan Act, and the Coronavirus Aid, Relief, and Economic Security Act. While advising the Governor and Cabinet on the appropriate use of benefits and resources, she also led and coordinated communication activities of relevant state agencies, local units of government, and private sector stakeholders across transportation, energy, cybersecurity, broadband, natural resources, water, health, and environmental sectors. Jodi served as the state's Chief Broadband Officer, directing the Next Level Connections program while planning for the anticipated \$1 billion in Broadband Equity Access and Deployment funding.

Federal & State Program Design & Administration, State of Indiana

As Executive Director of the Office of Community and Rural Affairs, Jodi oversaw strategic planning, development, budgeting, and implementation of multiple agency programs focused on community and rural development, including setting priorities, determining resource requirements, grant administration, reporting, and compliance. She built and managed internal and external relationships with local elected officials, economic development and planning organizations, the Indiana General Assembly, and various community-based partners. Jodi administered and managed a portfolio of grant programs, including a \$30 million Community Block Development Grant program for non-entitlement communities across Indiana. Additionally, she established and implemented the new Next Level Connections \$270 million Broadband Grant program, incorporating input from industry and community stakeholders, the Indiana General Assembly, and residents statewide.

REFERENCES

Julie Kempf, Director, IOED

317.954.2868

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

Tracy Barnes, Chief Information Officer, State of Indiana

317.268.8071

100 N. Senate Ave N551, Indianapolis, IN 46204

Kyle Walker, Indiana State Senator

317.232.9400

200 W. Washington Street, Indianapolis, IN 46204

EXTENSIVE EXPERIENCE IN:

- > Program design and management
- > Federally funded grant management and administration
- > Multi-agency coordination
- > Federally funded program compliance
- > Funding and braiding cost-share
- > Stakeholder engagement and coordination
- > Policy development

Adam PERRY

IT/System of Record Lead

Adam is the Director of Customer Success for the iEnergy Software group. He demonstrates profound expertise in overseeing software engagements and ensuring their success from the initial implementation phase through ongoing enhancements. With a proactive and agile approach, he leads strategic plans, forecasts, delivery, and evaluations of portfolio-level solutions, emphasizing cost-effective energy savings, distributed energy resources, and electrification. Adam has played a pivotal role in coordinating iEnergy Software deliveries for various programs across the country, showcasing his commitment to optimizing software functionality and ensuring a positive customer experience. His leadership extends to projects with Cascade Natural Gas, Pacific Power, Salt River Project (SRP), Orlando Utilities Commission (OUC), and Platte River Power Authority (PRPA) in Colorado. Beyond his role at iEnergy, Adam has extended his coordination expertise to other programs, exemplifying his dedication to enhancing software solutions in the energy sector.

SELECT PROJECT EXPERIENCE

iEnergy Software, Cascade Natural Gas (Oregon & Washington)

Adam oversees the iEnergy Care package for Cascade Natural Gas. He coordinates to enhance the use of iEnergy software. Adam manages overall improvements for Cascade Natural Gas programs administered in iEnergy and prioritizes a positive customer experience.

iEnergy Software, Pacific Power (California & Washington)

Adam supports Pacific Power's iEnergy instance in coordination with energy efficiency delivery teams. He manages enhancements to the Pacific Power iEnergy platform and supports program delivery teams in administering their iEnergy requirements and new product visions.

iEnergy Software, Salt River Project (SRP) (Arizona)

Adam implemented SRP's iEnergy suite of software products, including the new Public User Experience, OnSite mobile assessment tools, Trade Ally Connect, enhanced analytics, and robust integrations with SRP's systems. Adam manages ongoing software support. He coordinates with SRP, program delivery, and iEnergy teams to cultivate the use of iEnergy software for a more streamlined utility, customer, and trade ally experience.

iEnergy Software, Orlando Utilities Commission (OUC)

Adam guides OUC's iEnergy software instance and coordinates directly with the OUC and iEnergy teams to hone the use of iEnergy software. He managed the delivery of OUC's new Public User Experience, OnSite mobile assessment tools, and enhanced analytics platform.

DSM Portfolio & Programs, Platte River Power Authority (PRPA) (Colorado)

As Energy Solutions Supervisor and Program Manager, Adam supervised the delivery of PRPA's energy and customer solutions programs, as well as the staff, consultants, and trade allies that supported those programs. Through the design and delivery of a variety of commercial and residential DSM programs, as well as the implementation of supporting software, Adam grew

YEARS OF EXPERIENCE: 20

EDUCATION:

BS, Business Management,
Colorado State University

AS, Energy Management,
Colorado State University

CERTIFICATIONS:

LEED Accredited Professional
(LEED AP)

Certified Energy Efficiency
Program Manager, American
Public Power Association

STATES WORKED IN:

- ✓ Arizona
- ✓ California
- ✓ Colorado
- ✓ Florida
- ✓ Kentucky
- ✓ Oregon
- ✓ Utah
- ✓ Washington
- ✓ Wyoming

PRPA's annual energy efficiency portfolio investments and savings to over \$13 million and nearly 30,000 MWhs. Adam utilizes this program knowledge to inform the iEnergy team and work with clients across the nation to strengthen their programs and software solutions.

REFERENCES

Mike Green, PE, CEM, LEED AP, Sr. Engineer - Program Manager, Product Development, Salt River Project

602.236.4020

PAB32W P.O. Box 52025, Phoenix, AZ 85072

Adam Grant, Manager, DSM Program Delivery, NV Energy

702.402.2183

6226 West Sahara Avenue, Las Vegas, Nevada, 89146

Andrea Carillo, Sr. Product Specialist, Evergy

816.652.1082

1200 Main St, Kansas City, Missouri 64105

EXTENSIVE EXPERIENCE IN:

- > Customer service
- > Project management solutions
- > DSM planning and evaluation
- > Project management
- > IT software solution design
- > Data analysis and reporting
- > Stakeholder engagement
- > Start-up planning and launch

Stephanie CARTER

Case Management Policy Lead

Stephanie excels in project management, particularly in overseeing federally funded assistance programs. Her expertise lies in refining policies, optimizing workflows, and designing efficient processes. With a knack for steering high-performing, multifaceted teams, Stephanie has consistently demonstrated her ability to foster trust and consensus among clients and team members alike. Stephanie's expertise was showcased as the Program Manager for the \$167 million ARPA-funded mortgage assistance program under the U.S. Treasury's HAF in the State of Indiana. Her hands-on approach facilitated the swift implementation and disbursement of critical funding, achieving program goals of transparency, accountability, compliance, and software security. Managing a team of 60 staff members, Stephanie methodically improved program facets, including case management, eligibility review, and compliance reporting.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebate Programs, IOED

Stephanie is providing applicant services and case management to the IOED for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs.

IRA Home Energy Rebate Programs, OEE, DOD

Stephanie is providing applicant services and case management to the IOED for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs.

HAF, U.S. Treasury, IHCD

Stephanie was the Program Manager for the \$167 million ARPA-funded mortgage assistance program that expedited the implementation and disbursement of funding to community members most in need. Overall, the team provided a turn-key solution addressing the goals of transparency, accountability, compliance, and software security. Scope of services included the accelerated design and implementation of a simple, yet compliant, program. This involved a tailored software solution that successfully organized and streamlined program components, case management, intake, eligibility review, application verification, fund distribution, reporting, compliance, treasury reporting, and community engagement.

Stephanie specializes in the constant refinement of complex workflows. Managing a team of 60 staff members, Stephanie methodically examined and improved each facet of the program, including call center escalations, case management, case management QC/QA, external stakeholder coordination, and payment processing.

Due to this advanced skillset, the U.S. Department of Treasury asked Stephanie to participate in numerous training webinars to share her best practices and procedures with all U.S. States. Furthermore, Stephanie's proven systems have been highlighted by the U.S. Treasury as a model

YEARS OF EXPERIENCE: 3

EDUCATION:

BA, Special Education,
Marian University

STATES WORKED IN:

✓ Indiana

EXTENSIVE EXPERIENCE IN:

- > Program design and management
- > Process audits and improvements
- > Compliance, monitoring, and reporting
- > Stakeholder engagement and coordination
- > Marketing and outreach
- > Case management
- > Financial controls
- > Payment processing
- > Federal compliance
- > Federally funded grant management and administration
- > Policy development

for other states to adhere to approximately 10% and introduced management metrics, resulting in a 50% improvement in NPS scores for Q4 2021 and Q1 2022.

REFERENCES

Julie Kempf, Director, IOED

317.954.2868

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

Luke Stedke, Assistant Chief, Community Investments, Ohio DOD

614.203.9140

77 South High Street, 29th Floor, Columbus, OH 43215

Rich Harcourt, Chief Financial Officer, IHCD

317.233.0928

30 S Meridian St., Indianapolis, IN 46204

Tara DENNIS

Community Benefits & J40 Specialist

With over 20 years of extensive experience in program buildout, non-profit management, contract compliance, government relations, and external affairs, Tara is a seasoned professional dedicated to driving strategic success. Tara's proficiency extends to revenue forecasting, invoicing, outreach, and regional business development, fostering engagement with seven local trade associations and contributing to substantial energy savings. Tara strategically directs operations, workforce management, fund development, budget, and compliance, optimizing efficiencies and implementing impactful change management strategies. Her leadership impact is evident in roles where she has achieved significant success in gross margin growth, acquisitions integration, and regional strategy development. Her commitment to excellence is underscored by a proven track record of achieving 100% contract renewal rates and spearheading initiatives in new markets, electric vehicles, grid storage, and carbon reduction. Tara's dynamic leadership has consistently delivered results, making her a valuable asset in every role she undertakes.

SELECT PROJECT EXPERIENCE

Retrocommissioning Program Coordination/Management, CenterPoint Energy (Texas)

Tara is the Solutions Delivery Manager at CenterPoint Energy in Texas and oversees the Retrocommissioning Program, managing day-to-day operations, project coordination, and communication with staff, clients, customers, and stakeholders. Tara handles revenue forecasting, invoicing, outreach, and regional business development. As the program's representative, she actively engages with seven local trade associations and contributed to its second-highest recorded year of 8,181,226 kWh savings. Under her leadership, the program has completed 28 projects, with over 15 more in progress and set to finish in 2024 since she joined.

Director of Programs, SERJobs (Texas)

Tara set the strategic direction for various aspects, including operations, workforce management, fund development, budget, contract execution, and compliance. Her role involved optimizing departmental efficiencies by improving service delivery models and enhancing data reporting processes. Tara increased the agency's impact by implementing change management strategies and creating SOPs to meet contractual outcomes. Additionally, she collaborated with the advancement division to secure agency-wide funding and develop marketing and public relations strategies.

District Director, U.S. House of Representatives (Washington D.C.)

Tara led district offices, overseeing strategic aspects like resource development, global relations, data management, and external affairs. She enhanced visibility through a strong communications program, serving as a spokesperson for public relations. Under her leadership, the district achieved successes like annual gross margin growth, successful acquisitions integration, 100% contract renewal rates in 2016, 2018, and 2019, and spearheading regional strategies in new markets, electric vehicles (EV), grid storage, and carbon reduction.

YEARS OF EXPERIENCE: 20

EDUCATION:

EMBA, w/ Concentration in Global Marketing, Mercer University

BS, Public Health, Texas A&M University

STATES WORKED IN:

- ✓ Alabama
- ✓ Florida
- ✓ Georgia
- ✓ North Carolina
- ✓ Tennessee
- ✓ Texas
- ✓ Washington D.C.

EXTENSIVE EXPERIENCE IN:

- > Program buildout
- > Government relationships
- > Stakeholder engagement
- > Equity and inclusion

Senior Manager - Member Engagement & Programs, Greater Houston Partnership

Tara transformed a regional volunteer program, emphasizing design, implementation, and stewardship. She diversified membership through inclusive partnerships and launched a cost-effective small business program. Tara also served as a spokesperson for public relations and crisis management. Achievements include annual gross margin growth, successful acquisitions integration, 100% contract renewal rates in 2016, 2018, and 2019, and leading regional strategies in new markets, EVs, grid storage, and carbon reduction.

REFERENCES

Rodeney Henderson, JR, Staff Consultant Electric Operations - Power Delivery, Centerpoint Energy

713.975.3052

1111 Louisiana Street, Houston, TX 77002

Glen Rhoden, Energy Manager, Sustainability Division, Harris County Office of County Administration

713.274.1143

1001 Preston St. #500, Houston, TX 77002

**Adrian Carter, Energy Manager, Fort Bend Independent School District
State Board President, Texas Energy Managers Association (TEMA)**

832.687.0803

13600 Murphy Road, Stafford, TX 77477

Rick PERRY

Utility Coordination Lead

Rick has over seven years of experience in project management and design. He has worked on a diverse range of projects, including demolition and property management, as well as infrastructure projects such as road reconstruction, new road construction, intersection improvements, roundabout design, slide corrections, and more.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebates Programs, IOED)

Rick is providing program management and development services to the IOED for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Indiana, with at least 40% of the funding focused on homes in disadvantaged or low-income communities. As part of the program development, Rick and his team developed a Utility Data Access Workflow, detailing the process and steps needed to gather utility data for the Home Energy Program applicants and steps to take if a utility company refuses to participate or provide the needed utility data.

IRA Home Energy Rebates Programs, OEE

Rick is providing program management and development services to the OEE for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Ohio, with at least 40% of the funding focused on homes in disadvantaged or low-income communities. As part of the program development, Rick and his team developed a Utility Data Access Workflow, detailing the process and steps needed to gather utility data for the Home Energy Program applicants and steps to take if a utility company refuses to participate or provide the needed utility data.

REFERENCES

Julie Kempf, Director, IOED

317.954.2868

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

Caroline Johnstone, Energy Programs Manager, OEE

614.387.0218

77 South High Street, 29th Floor, Columbus, OH 43215

Annika Brown, Energy Efficiency Program Manager, IOED

317.416.8824

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

YEARS OF EXPERIENCE: 7

EDUCATION:

BS, Civil Engineering,
Trine University

CERTIFICATION:

PE, Licensed Engineer in Indiana

STATES WORKED IN:

- ✓ Indiana
- ✓ Ohio

EXTENSIVE EXPERIENCE IN:

- > Project and program management
- > Demolition
- > Schedule optimization
- > Multi-agency coordination
- > Utility coordination
- > Stakeholder engagement and coordination

Kristin BOURQUE

AFWA & Compliance Lead

Kristin brings nearly 15 years of expertise in risk management and compliance. Her focus primarily revolves around delivering internal audit services to clients spanning various sectors, such as publicly traded companies, governmental entities, higher education institutions, healthcare organizations, and financial services firms. With extensive experience in conducting audits of business processes and controls, Kristin excels in developing and implementing risk mitigation strategies and disaster recovery plans. She also possesses proficiency in fraud prevention, monitoring, and data analytics. Kristin's deep understanding of internal audit procedures and controls enables her to effectively identify and evaluate business risks, provide project management support for business processes, and offer recommendations to enhance internal controls.

SELECT PROJECT EXPERIENCE

Disaster Recovery Management, Fort Bend County ERAP & Fort Bend County COVID-19 Mortgage Assistance Program

Kristin provided leadership over the QC/QA team. She was responsible for providing daily oversight and support to a team responsible for QC/QA of payments to vendors. Kristin provided regular status updates and process improvement suggestions to the client on an ongoing basis, managed communications with the county, and performed troubleshooting as needed. Kristin worked directly with the development team to design the project management and review the documentation system utilized by the QA/QC team.

Project Management, ReBuild NC - North Carolina Office of Recovery & Resiliency

Kristin was the team lead for the QC team. As part of the Award QC team, she performed review of applicant awards for compliance with program regulations and provided oversight internally to the P&N QC team. Kristin also participated in periodic status updates with the client and provided process improvement suggestions related to the QC process of the program.

Project Management, State of Louisiana, Division of Administration, OCD Restore Louisiana Program

Kristin was a manager of the Financial Management Team and worked daily with Project Management, OCD, and the Financial Management team members to ensure proper funding of files through establishing efficient and proper processes that abide by the Restore Louisiana Program Manual and HUD guidelines. Her position entails quality checks on files, requisitioning of funds from OCD, disbursing checks to applicants, and creating/ reviewing reports to meet contract deliverables. Kristin assisted with the startup of the program by identifying quality control procedures to implement and opportunities to improve inefficiencies in processes.

YEARS OF EXPERIENCE: 15

EDUCATION:

BS. Accounting (Internal Audit Focus), Louisiana State University

STATES WORKED IN:

- ✓ Louisiana
- ✓ Texas
- ✓ North Carolina

EXTENSIVE EXPERIENCE IN:

- > Program management
- > Disaster recovery management
- > Fraud prevention and monitoring
- > Risk mitigation
- > Internal audits
- > Data analytics
- > Internal controls
- > Business risk evaluation

REFERENCES

Mark Staley, Partner, EisnerAmper

225.408.4464

8550 United Plaza Blvd # 1001, Baton Rouge, LA 70809

**Mathew LaBruyere, Chief Administrative Officer, Louisiana State Employees'
Retirement System**

225.342.9941

P.O. Box 44213, Baton Rouge, LA 70804-4213

Chad Bourque, CIA, President, Institute of Internal Auditors Baton Rouge Chapter

225.296.3951

P.O. Box 14960, Baton Rouge, LA 70898

Dana DAIGLE, CPA, CFE

Finance Lead

Dana has 13 years of experience in the fields of financial management and disbursements, disaster management, forensic accounting, compliance, and litigation support through managing the processes and personnel of several COVID-19 relief programs, numerous settlement claims programs, and four HUD-funded CDBG-DR programs. She has assisted with designing and implementing policies and processes resulting in over \$3 billion in payments for multiple large-scale programs and settlement funds across the country. She has led teams of up to 50 members for the Gulf Coast Claims Facility, Deepwater Horizon Economic and Property Damages Settlement, and the Restore Louisiana Program.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebate Programs, Multiple States

The EPA Home Energy Rebate Program provides financial incentives for homeowners to make energy-efficient upgrades, such as installing heat pumps, insulation, and energy-efficient appliances. EisnerAmper is supporting the state agencies in Ohio, Pennsylvania, Florida, Indiana, and Arizona with the full implementation of these programs, helping to reduce energy costs, lower greenhouse gas emissions, and promote clean energy adoption. Dana is the Financial Management and Disbursements Lead/Senior Program Leadership for these programs.

ReBuild North Carolina, North Carolina Office of Recovery & Resilience (NCORR)

Dana manages financial operations for NCORR, overseeing the state-wide hurricane recovery effort. This program is federally funded by the U.S. Department of Housing and Urban Development and employs CDBG-DR funds. Dana leads payment functions, designs processes, and ensures accurate reporting. She played a key role in establishing program procedures and managing team operations, including disbursement processing, communication, and updates for stakeholders and the state.

Restore Louisiana Program 2016 & 2020, Division of Administration, OCD, State of Louisiana

Dana is a senior manager on the Financial Management Team. She collaborates with Project Management, OCD, and team members to streamline processes that align with the Restore Louisiana Program Manual and HUD guidelines. Her role involves quality checks on files, obtaining funds from OCD, distributing applicant checks, and generating/reviewing reports. Dana has enhanced processes, optimized resource allocation, and achieved remarkable results. The Financial Management team has disbursed 42,000+ checks totaling \$667 million for 2016 floods and \$35M+ for 2020/2021 hurricanes in Louisiana. Dana also supervises Financial Management for the Louisiana Watershed Initiative Buyout Program and a vital OCD Reconciliation project. This high-priority reconciliation swiftly managed around \$150M in program income and \$100M in expenditures between State Accounting Systems and the DRGR for CDBG-DR funds.

YEARS OF EXPERIENCE: 13

EDUCATION:

MS, Accountancy,
Louisiana State University

BS, Accountancy,
Louisiana State University

CERTIFICATIONS:

Certified Public Accountant
(CPA),

Louisiana License No. 0027421

Certified Fraud Examiner (CFE),
Louisiana License No. 656201

STATES WORKED IN:

- ✓ Louisiana
- ✓ Indiana
- ✓ North Carolina

Indiana HAF, IHCD

Dana, as the Program Manager for the Financial Management and Disbursements Team, supports IHCD in handling the state-wide Homeowner's Assistance Fund. She leads financial management, aiding in system setup, processes, and procedures. Dana manages team processes, covering fund handling, disbursements, and reporting, along with communication to stakeholders, PMO, and the state. She's also involved in executing the close-out plan to conclude the program effectively.

REFERENCES

Mark Staley, Partner, EisnerAmper

225.408.4464

8550 United Plaza Blvd # 1001, Baton Rouge, LA 70809

Jay Cahill, Vice President, Egis BLN USA, Inc.

317.806.3047

8320 Craig Street, Indianapolis, IN 46250

Ginger Moses, Chief Operating Officer, Louisiana Office of Community Development

225.219.9615

617 N. Third St., 6th floor, Baton Rouge, LA 70802

EXTENSIVE EXPERIENCE IN:

- > Financial management and disbursements
- > Disaster management
- > Program and project management
- > Federally funded grant management and administration
- > Program close-out
- > Client coordination
- > Stakeholder engagement and coordination
- > Multi-agency coordination

Joseph MARCO

Contractor Invoicing Manager

Joseph is a seasoned Program Manager with over 20 years of experience in directing large-scale programs and driving revenue performance to achieve dynamic goals. He specializes in budget management, developing project scopes, enhancing customer relationships, and implementing continuous design improvements. Joe has extensive expertise in managing operations, utilizing Salesforce for scheduling and customer satisfaction, and coordinating large payment systems. Throughout his career, he has successfully developed and recruited trade networks, collaborated with marketing teams, and partnered with nonprofit organizations to promote energy performance programs.

SELECT PROJECT EXPERIENCE

Ohio IRA Home Energy Rebate Programs, OEE

Joseph is providing program development support services to the OEE for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Ohio, with at least 40% of the funding focused on homes in disadvantaged or low-income communities.

Program Management, Dominion Energy

Joseph oversaw and managed this comprehensive program with a \$24 million budget portfolio, implementing robust metrics to ensure it meets client and contractual goals and KPIs. He has developed relationships with over 100 external contractors to enhance home energy performance, utilizing Salesforce for scheduling, managing customer satisfaction, processing rebates, and overseeing the overall budget. Joseph coordinated and managed \$7.8 million in payments to residential customers in Northeast Ohio and developed effective plans for managing and recruiting the trade ally network. He collaborated closely with the marketing team to strategize business processes and ensure assessment goals were met, and partnered with nonprofit organizations to promote the program through outreach efforts. Additionally, he regularly presented program updates to the Ohio Commission.

Home Energy Efficiency Portfolio, Multiple Clients

As Project Manager, Joseph oversaw a team of 20 direct reports across three office locations in Cleveland, Columbus, and West Virginia. He developed work plans for a \$3 million budget portfolio focused on home energy efficiency, managing forecasting, budgeting, and P&Ls to ensure profitable margins were met. Joseph spearheaded the start-up of a demand response program, successfully installing over 10,000 smart thermostats, which significantly enhanced energy efficiency. He increased departmental productivity by streamlining processes and improving customer satisfaction and implemented an innovative scheduling system that reduced the carbon footprint. Additionally, Joseph regularly presented program updates to the Ohio Commission.

YEARS OF EXPERIENCE: 20

EDUCATION:

AS, Business Administration,
Cuyahoga Community College

STATES WORKED IN:

- ✓ Ohio
- ✓ Indiana

EXTENSIVE EXPERIENCE IN:

- > Program design and management
- > Project management
- > Multi-agency coordination
- > Stakeholder engagement and coordination
- > Strategy
- > Project delivery life-cycle
- > Data analysis and reporting

REFERENCES

Mari Cyngier, Senior Quality Management Specialist, Enbridge Gas Ohio

330.571.9414

320 Springside Drive, Akron, Ohio 44333

Joseph Karam, Senior Business Development Analyst, Enbridge Gas Ohio

330.410.8941

320 Springside Drive, Akron, Ohio 44333

Dan Boes, Manager Gas Operations, Enbridge Gas Ohio

330.664.2661

320 Springside Drive, Akron, Ohio 44333

Jennifer BUTLER

Close Out Specialist

Jennifer Butler is a Partner and leads the Governmental and Disaster Management team at EisnerAmper. Prior to joining the firm in 2020, she served for over 20 years in executive leadership roles at organizations dedicated to preparing, mitigating, and recovering from natural and man-made disasters. Jennifer leads large-scale disaster recovery programs involving the administration of federal funds, such as ARPA, FEMA, RESTORE Act, CARES Act, Homeland Security funding, and HUD CDBG grants. Jennifer has extensive experience in disaster recovery and grants management, including compliance, financial management, program management, grant writing, and federal regulations.

SELECT PROJECT EXPERIENCE

EPA Home Energy Rebate Programs, Multiple States

The EPA Home Energy Rebate Program provides financial incentives for homeowners to make energy-efficient upgrades, such as installing heat pumps, insulation, and energy-efficient appliances. EisnerAmper is supporting the state agencies in Ohio, Pennsylvania, Florida, Indiana, and Arizona with the full implementation of this program, helping to reduce energy costs, lower greenhouse gas emissions, and promote clean energy adoption. Total program funds may exceed \$650 million.

FEMA PA Grant Management Services, Terrebonne General Health System

Jennifer provides project management support and oversight related to federal program guidance and serves as the Project Advisor for Not-for-Profit Auditing, Accounting, Compliance, and Operations.

Broadband Equity, Access, and Deployment (BEAD) Program, Louisiana Office of Broadband Development & Connectivity

Jennifer serves as a subject matter resource for NTIA federal grant compliance supporting the program team in communications with NTIA, the development of the Initial Application, responding to Federal Register requests for public comment on the federal program, Uniform Guidance compliance, development of policies and procedures, audit readiness, and project management.

Granting Unserved Municipalities Broadband Opportunities (GUMBO) Program, Louisiana Office of Broadband Development & Connectivity

Jennifer serves as a subject matter resource for ARPA federal grant compliance supporting the program team in Uniform Guidance, payment review processes, audit readiness, and project management.

ARPA Grant Management Services, Caddo Parish Police Jury

Jennifer provides project management and oversight related to federal program guidance and serves as the Project Advisor for Subrecipient Assessment and Monitoring.

YEARS OF EXPERIENCE: 21

EDUCATION:

MS, Homeland Security Leadership,
University of Connecticut

Master's Certificate, Federal Grant Management,
George Washington University

Associate Certificate, Federal Contracting,
George Washington University

CERTIFICATIONS:

Member, National Grants Management Association

Member, International Association of Emergency Managers

Member, Louisiana Emergency Preparedness Association

FEMA Emergency Management Institute

STATES WORKED IN:

- ✓ Louisiana
- ✓ Indiana
- ✓ North Carolina
- ✓ Georgia
- ✓ Mississippi
- ✓ New York
- ✓ Oklahoma

State of Louisiana's ERAP, Louisiana Housing Corporation and Office of Community Development

Jennifer serves as overall project manager over financial functions, including overseeing the accounting of applicant funds and applicant disbursements. Jennifer also managed the call center IT support and assisted in developing policies and procedures to ensure quality control for funds disbursement. She is the direct liaison with the prime contractor, helps execute the scope of work, and provides relief to the impacted citizens of Louisiana.

ERAP, Fulton County, GA

Jennifer served as the lead for the financial management functional area and provides overall operational project management support.

REFERENCES

Mark Staley, Partner, EisnerAmper

225.408.4464

8550 United Plaza Blvd # 1001, Baton Rouge, LA 70809

Jay Cahill, Vice President, Egis BLN USA, Inc.

317.806.3047

8320 Craig Street, Indianapolis, IN 46250

Ginger Moses, Chief Operating Officer, Louisiana Office of Community Development

225.219.9615

617 N. Third St., 6th floor, Baton Rouge, LA 70802

EXTENSIVE EXPERIENCE IN:

- > Grants management
- > Program management
- > Federal compliance
- > Disaster recovery
- > Grant writing

Dakota MORGAN

Contractor Liaison

Dakota Morgan is a highly experienced professional with over two decades of expertise in construction, home energy assessments, quality control inspections, and HVAC services. With a strong foundation in customer service and personnel management, Dakota has demonstrated exceptional skills in technical support, problem-solving, and quality control oversight. Adept at handling complex projects and ensuring compliance with industry standards, Dakota excels in coordinating with various stakeholders, managing staff, and providing precise technical guidance. With a comprehensive understanding of residential safety, energy efficiency, and HVAC diagnostics, Dakota's career reflects a commitment to excellence and a proven ability to drive successful outcomes in any role.

SELECT PROJECT EXPERIENCE

IRA Home Energy Rebate Programs, OEE, DOD

Dakota is providing program development support services to the OEE for the development and implementation of their Home Energy Rebate program as part of the IRA's Home Efficiency Rebates (Section 50121, HOMES) and Home Electrification and Appliance Rebates (Section 50122, HEEHRA) programs. These programs aim to provide energy efficiency improvements to multi-family and single-family homes throughout the State of Ohio, with at least 40% of the funding focused on homes in disadvantaged or low-income communities.

Quality Control Inspector, Impact Community Action

As a Quality Control Inspector at Impact Community Action, Dakota conducts meticulous inspections for the HWAP program, ensuring adherence to rigorous standards. He manages funding sources for each inspection, providing technical guidance to insulation crews and inspectors, and liaising with HVAC, Plumbing, and Construction companies to maintain compliance with program guidelines. Additionally, Dakota meticulously reviews NEAT audits for accuracy, verifies the completeness of customer files, and addresses any discrepancies with the initial inspector. Handling scheduling intricacies, Dakota coordinates inspection times and manages call backs with clients and crews, while diligently tracking and reporting the progress of QC appointments and all associated tasks..

Home Energy Efficiency Program, CLEARResult

As a Field Manager, Dakota Morgan oversaw a team of up to 17 energy auditors and 2 Quality Assurance Field Specialists, ensuring seamless operations and adherence to company standards. Dakota's responsibilities included conducting Home Energy Assessments, providing comprehensive work scopes to customers, and offering technical guidance to all field staff and program contractors. Additionally, Dakota performed rigorous quality control inspections and testing, resolving service requests efficiently through Salesforce, and managing scheduling logistics for up to 100 appointments weekly. With expertise in HVAC diagnostics, Dakota installed smart thermostats and addressed residential HVAC system issues as needed. Dakota also played a key role in reviewing assessment reports, resolving customer conflicts, and managing rebate status requests, all while serving as a Proctor for the Building Performance Institute, Inc. and overseeing quality control inspections for the low-income weatherization program.

YEARS OF EXPERIENCE: 23

CERTIFICATIONS:

State of Ohio HVAC License
#45577 (Escrow)
EPA Type II Refrigeration License
Mainstream Engineering Indoor
Air Quality Certification
Mainstream Engineering Green
HVAC Technician Certification
Mainstream Engineering
R410A Certification
Mainstream Engineering PM
Tech Certification
LEAD RRP
Building Performance Institute -
Quality Control Inspector QCI
Building Performance Institute -
Energy Auditor
North American Technical
Excellence (NATE) - Gas Furnace
Installation
NATE - Air Conditioning
Installation
NATE- Heat Pump Installation
NATE- Heat Pump Service
NATE- Gas Furnace Service
NATE- Air Conditioning Service
International Restoration Institute
IRIMold Remediation Specialist
MRS # 19676

STATES WORKED IN:

✓ Ohio

REFERENCES

Julie Kempf, Director, IOED

317.954.2868

One North Capitol Avenue, Suite 900, Indianapolis, IN 46204

Luke Stedke, Assistant Chief, Community Investments, Ohio Department of Development

614.203.9140

77 South High Street, 29th Floor, Columbus, OH 43215

Mari Cyngier, Senior Quality Management Specialist, Enbridge Gas Ohio

330.571.9414

320 Springside Drive, Akron, Ohio 44333

EXTENSIVE EXPERIENCE IN:

- > QC/QA
- > Process audits
- > Multi-agency coordination
- > Stakeholder engagement

Technical Response

ATTACHMENT A: TECHNICAL REQUIREMENTS

Understanding of the Project Requirements

Please see file 120003 O5 Egis BLN Consulting USA, LLC File 2 of 5 for Egis's completed Attachment A - Technical Requirements.

Proposed Development Approach

Please see file 120003 O5 Egis BLN Consulting USA, LLC File 2 of 5 for Egis's completed Attachment A - Technical Requirements.

Technical Requirements

Please see file 120003 O5 Egis BLN Consulting USA, LLC File 2 of 5 for Egis's completed Attachment A - Technical Requirements.

DETAILED PROJECT WORK PLAN

Based on our national expertise in designing utility-administered energy efficiency programs and more importantly, **our work designing and deploying IRA rebate programs in Indiana, Ohio, Florida, Arizona, South Carolina, and Pennsylvania**, we have developed a streamlined approach that complies with federal guidelines and accomplishes all the items set forth in the listed scope of work of the RFP. Our methodical, step-by-step process to guide you through both the planning and delivery phases and successfully deploy your initiatives is as follows:

A Proven, Step-by-Step Approach for IRA Rebate Program Design

The Egis Team provides the NDEE with a collaborative and comprehensive approach to creating an impactful and compliant program for Nebraska residents. Our five-phase process, successfully deployed in multiple states on these IRA home energy rebate programs, is outlined below. Each phase in this thoughtfully designed process builds upon the previous and is grounded in a methodical and collaborative approach with the NDEE Team.



Our Proposed High-Level Program Design Strategy Narrative

The energy rebate programs contained in the IRA provide Nebraska with a multifaceted opportunity to assist the state's residents. **As a national leader in the energy rebate space, the Egis Team is committed to working collaboratively with the NDEE to create job opportunities, reduce the energy burden, enhance the building stock, and improve the health, safety, and comfort of Nebraska residents.** Our team has designed, delivered, and administered over 750 energy rebate programs across the U.S. and was recently selected by Ohio, Indiana, Arizona, Pennsylvania, Florida, and South Carolina to design and implement their IRA Energy Rebate Programs.

In collaboration with the State of Indiana, our program design team drafted and submitted their Application Checklist to the U.S. DOE for Sections 50121 and 50122 and subsequently received preliminary approval. Most recently, with the state of Arizona, our program design team drafted and submitted their Application Checklist, Budget Justification Workbook, and Implementation Blueprints to the U.S. DOE for Section 50122 and released Tranche 1 and launched their program all within 52 days of notice to proceed. **Our team has been actively working on the Implementation Blueprints and will provide the NDEE with best practices and approaches that are being considered by other states.**

Having participated in multiple U.S. DOE Sprint Cohorts, our team has worked in very close collaboration with the U.S. DOE and key local stakeholders (utilities, CBOs, trade organizations, etc.). This collaboration has helped shape our approach in Arizona, Indiana, Ohio, Florida, South Carolina, and Pennsylvania and uniquely positions our team for success with the State of Nebraska.

Stakeholder Engagement Deliverables

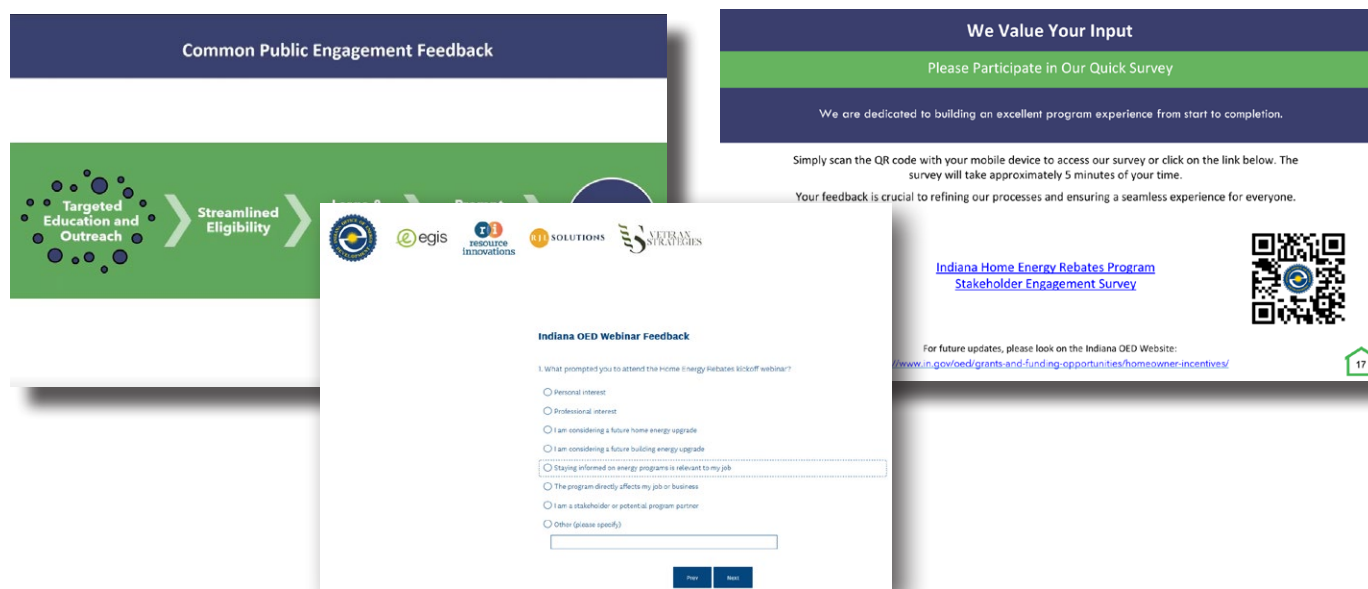
The Egis Team has unparalleled experience designing and implementing stakeholder engagement strategies through multifaceted communication and thoughtfully targeted outreach approaches for the hundreds of energy rebate and individual assistance programs administered nationally, and more recently for the States of Indiana, Ohio, Arizona, Pennsylvania, South Carolina, and Florida as part of their IRA Rebate Programs design and implementation.

Outlined below is our approach to Stakeholder Engagement Plan development, based upon lessons learned in the states mentioned above and addressing RFP required deliverables:

Stakeholder Engagement Deliverables

The Egis Team has completed extensive statewide stakeholder engagement activities in other states nationwide. We have already proactively identified a number of stakeholders, and we will work collaboratively with the NDEE to finalize this list and develop methods for engaging these entities. We have successfully used:

- Stakeholder roundtables
- Public meetings
- Town halls
- Online surveys



The Egis Team will work collaboratively with the NDEE to organize public meetings with potential stakeholders. Additionally, we will provide the following:

- Develop meeting materials as needed (including meeting agendas, presentations, questions, and answer documentation)
- Convene and host online public input session(s)
- Establish a public online comment form
- Facilitate interagency strategy and feedback sessions
- Hosting topic-focused stakeholder discussion and feedback meetings
- Use surveys as needed to obtain additional input

Proven Track Record with Community Engagement in IRA Rebate Programs

The Egis Team provides proven strategies and tactics which have been successfully deployed in multiple states to inform program design on these IRA Rebate programs.

Indiana Case Study	Ohio Case Study
• 2 virtual town halls • 6 in-person town halls • Roundtable discussions with Indiana Stakeholders (community action agencies (CAAs), utilities, public housing authorities (PHAs), organized labor, distributors, non-profits)	• 10 town halls • Roundtable discussions with Ohio Stakeholders (CAAs, utilities, PHAs, organized labor, distributors, non-profits)

Stakeholder Organization

We will work collaboratively with the NDEE to establish a critical path for early engagement with relevant stakeholders. Further, it is imperative to note that ongoing communication and coordination with many of these entities will be critical to the overall program success, and we will develop an ongoing communication strategy for the entirety of the program. To organize our approach, we systematically group stakeholders by interest or perspective. Below is a list of stakeholders by category or industry (Table 1: Education, Government, and CBO Stakeholders, Table 2: Nebraska Community Action Partnerships, and Table 3: Utilities, Co-ops, and Public Power Districts):

Education		Governments & CBOs	
- Central Community College* - Metropolitan Community College* - Mid-Plains Community College - Northeast Community College* - Southeast Community College* - Western Nebraska Community College - University of Nebraska-Lincoln - University of Nebraska at Omaha - University of Nebraska at Kearney - University of Nebraska Medical Center - Creighton University - Bellevue University - Doane University - Hastings College - Midland University - Nebraska Wesleyan University - Peru State College - Wayne State College - York College	- Habitat for Humanity of Omaha - NeighborWorks Lincoln - Omaha Economic Development Corporation - Family Housing Advisory Services - Midwest Housing Development Fund - Nebraska Housing Developers Association - Housing Foundation for Sarpy County - Community Housing Development Corporation - Nebraska Housing Resource, Inc. - NeighborWorks Northeast Nebraska - NeighborWorks Columbus - The Seldin Company - Holy Name Housing Corporation - Affordable Housing Initiatives - CenterPointe - CEDARS Youth Services - New Community Development Corporation - Heartland Family Service - Catholic Charities of the Archdiocese of Omaha - Lutheran Family Services of Nebraska - Together Inc.	- The Salvation Army of Omaha - United Way of the Midlands - Nebraska Appleseed - Center for People in Need - Community Action of Nebraska - Open Door Mission - Siena/Francis House - Completely Kids - Youth Emergency Services - Intercultural Senior Center - Omaha Home for Boys - Boys Town - Charles Drew Health Center - Legal Aid of Nebraska - Habitat for Humanity of Omaha - Heart Ministry Center - Food Bank for the Heartland - Project Harmony - Omaha Healthy Kids Alliance - Heartland Workers Center - Together Omaha - Inclusive Communities - Immigrant Legal Center - OneWorld Community Health Centers - Nebraska Urban Indian Health Coalition - Nebraska Children and Families Foundation	
*Offers education in renewable energy, energy efficiency, and sustainable practices or includes courses on energy efficiency and renewable energy technologies.			

Table 1: Education, Government, and CBO Stakeholders

Nebraska Community Action Partnerships	
- Blue Valley Community Action Partnership - Central Nebraska Community Action Partnership - Community Action Partnership of Lancaster and Saunders Counties - Community Action Partnership of Mid-Nebraska	- Eastern Nebraska Community Action Partnership - Northeast Nebraska Community Action Partnership - Northwest Community Action Partnership - Southeast Nebraska Community Action Partnership - Western Nebraska Community Action Partnership

Table 2: Nebraska Community Action Partnerships

Utilities, Co-ops, & Public Power Districts

Electric Utilities

- Black Hills Energy
- Northern Natural Gas
- Northwestern Energy
- Aquila (now part of Black Hills Energy)

Co-ops

- Niobrara Valley Electric Membership Corporation

Public Power Districts

- Omaha Public Power District (OPPD)
- Lincoln Electric System (LES)
- Metropolitan Utilities District (MUD)
- Loup Power District
- Norris Public Power District
- Cuming County Public Power District
- Butler Public Power District
- Southern Public Power District
- Tri-State Generation and Transmission Association
- Howard Greeley Rural Public Power District
- Perennial Public Power District
- Dawson Public Power District
- Twin Valleys Public Power District
- Cornhusker Public Power District
- Northwest Rural Public Power District
- Panhandle Rural Electric Membership Association
- Chimney Rock Public Power District
- Niobrara Valley Electric Membership Corporation

Table 3: Utilities, Co-ops, and Public Power Districts

Focus on J40 Communities

The Egis Team will work collaboratively with the NDEE to establish strategies that facilitate broad participation for businesses, individuals, and not-for-profits within J40/disadvantaged areas. Components of the J40 efforts include people, communities, businesses, educational institutions, not-for-profits, and other stakeholders as determined by the NDEE.

The Egis Team provides experienced professionals with a proven track record of creating multi-dimensional strategies to foster broad participation within traditionally hard-to-reach segments of the population. Our strategy includes stakeholder engagement, leveraging trusted community leaders, and collaboration with local trade associations, small business groups, social and environmental justice organizations, and other potential program partners.

Our multifaceted approach to Justice 40 engagement begins with stakeholder identification, the development of marketing/outreach strategies, as well as coordination with parallel programs to identify proven contractors (weatherization, utility administered programs).

Our team helps communities and educational institutions by developing Workforce Development and Career Readiness Training, as well as fast tracking certification programs.

We thoughtfully communicate with people by implementing an applicant pipeline assistance:

- Multifaceted and engaging community town halls
- Partnering with not-for-profits
- Ongoing presence in J40 communities throughout the program life cycle
- Conducting job fairs and contractor roundtables
- Auditors training in J40 communities
- Establishing small business and minority set-aside contracts
- Partnering with career and vocational training institutions for fast-tracked career readiness training

Identification of Supply Chain Contacts & Trade Councils

Additionally, our team will work collaboratively with suppliers, contractors, and trade councils. Below is a list of some of the organizations we may work with on this project.

- Associated General Contractors of America – Nebraska Chapter
- Nebraska Builders and Contractors Association
- Nebraska State Home Builders Association
- Nebraska Concrete and Aggregates Association
- Nebraska Masonry Alliance
- Nebraska Electrical Contractors Association
- Nebraska Roofing Contractors Association

Data Collection and Informed Decision Making

We will work collaboratively with the NDEE to develop presentation material and a questionnaire that will be distributed during stakeholder outreach and community engagement activities. Our team will collect the result of the questionnaires, analyze responses, and provide detailed reports to the NDEE related to the unique perspectives shared by various stakeholders (utilities, contractors, CAAs, non-profits, potential program applicants, etc.) to better inform the final program strategy.

Collaborative Approach to Program Design

As outlined below, we have developed and successfully implemented a strategy for a thoughtful, comprehensive approach to designing these IRA rebate programs. The Egis Team provides a step-by-step process to best position the State of Nebraska for the most impactful program possible.

Step 1: Identify Nebraska's Goals & Objectives

There are several possible goals and objectives that can be accomplished through these energy rebate programs. The Egis Team will work collaboratively with the NDEE Team to identify what these should be for Nebraska. Below is a sampling of those goals:

- Compliance
- Maximize job creation
- Achieve statewide reach
- Cost-effective and efficient delivery model
- Seamless applicant experience
- Fast-track career readiness
- Collaborating with CAAs
- Maximize benefits to low-to-moderate Income (LMI) households
- Energy affordability (reduce energy consumption)
- Maximize contracting opportunities for Nebraska businesses and service providers
- Low administrative burden
- Uniformity and standardization
- Achieve J40 goals
- Collaboration with tribal communities

Our program design team will work collaboratively with the NDEE and other stakeholders to prioritize objectives and align the program design and delivery plans to best position the state to achieve your objectives.

Step 2: Proactive Risk Identification & Mitigation

For the NDEE to maximize the impact of these funds, it is imperative to proactively identify the challenges and impediments to achieving the strategic objectives. These programs carry many common challenges associated with other federally funded programs. However, our experience has proven that energy rebate programs are complex from a design and delivery standpoint and present a variety of unique obstacles. Our team is uniquely aware of these challenges because of our combined work managing \$40 billion in federally funded programs and the previously mentioned states' IRA Rebate Programs. Some of the challenges that specifically apply to these programs, which must be addressed during design and monitored throughout implementation, are:

- Multi-layered federal and state compliance
- Applicant confusion
- Fraud, waste, and abuse
- Contractor capacity
- Landlord rent restrictions
- Equipment scarcity and supply chain shortages
- Lack of public awareness
- Energy auditor scarcity
- Changing federal reporting requirements
- NDEE staff capacity
- Achieving J40 requirements
- Programmatic IT/system of record needs
- Multi-family unit applicant cost-share requirements

Detailed aspects of the design process will include a number of considerations that include eligible households, type of upgrades, income verification, rebate amounts, cost caps, education, and outreach strategies, developing and managing qualified contractor networks, data collection, compliant reporting, accurate forecasting, and continual review of U.S. DOE guidelines and federal regulations.

Step 3: Aligning Nebraska Goals & Risk Mitigation Strategies with Key Program Decisions

Upon completing the two activities outlined above, the State of Nebraska can embark upon exploring a number of activities, key considerations, and strategic decisions that will help formulate program design, answers to the state's U.S. DOE application, and inform the development of the U.S. DOE Blueprint Plans. Outlined below are the categories of activities and key considerations, and a more detailed narrative can be found throughout this technical response to this RFP.

Stakeholder Engagement

Thoughtfully engaging with interested parties and potential program partners is a critical component to shaping the final design of these IRA Rebate Programs. The Egis approach facilitates a multi-faceted engagement strategy (Table 4: Engagement Methods and Table 5: Stakeholder Engagements) that identifies key stakeholder groups and specific data points that will be critical to helping shape the final program design. We will work collaboratively with the NDEE and utilize our statewide network of relationships across Nebraska to gather insightful input and community "buy-in" to best position the program for success.

Engagement Methods

- Virtual listen sessions
- Town halls and public meetings
- Roundtable discussions
- Online and in-person surveys
- One-on-one meetings

Table 4: Engagement Methods

Stakeholder Category	Purpose of Engagement	Engagement Methods
Consumers Applicants	• Impression of energy costs, needs, and concerns • Familiarity with other federal rebate programs • Identification of community thought leaders (potential program surrogates) • Interest in specific rebate offerings • Which marketing channels best reach the audience • Interest in energy industry jobs	• Town hall meetings leveraged by State and local elected leaders • Forums facilitated by faith-based & NGO community leaders • Online survey • Online platforms such as Nextdoor • Neighborhood Association meetings • Partner with locally owned grocery stores strategically located in J40 windows
Workforce Development	• Program offerings • Existing curriculum • Demographics of existing student population • Existing programs in following areas: • Electricians • HVAC Technician • Insulation workers • Building Analyst Technicians & Professionals • BPI Energy Auditors • BPI Building Science Principles • HERS Raters	• 1-on-1 meetings with senior leadership at Career Techs, Community Colleges, and other educational institutions • Educational and non-profit institutions focused on workforce development
Contractors	• Familiarity with energy rebate programs • Skillset and expertise • Financial capacity • Familiarity/Experience with government contracting • Workforce capacity • Labor Shortages (specifically skilled trade positions required for installation) • Geographic reach • Designation as Minority, Woman, or Veteran owned business • Wages/Davis Bacon	• Contractor Surveys • Industry forums • Information from HVAC and Building trade industry associations

Stakeholder Category	Purpose of Engagement	Engagement Methods
Special Interest Groups	• Proven community partner with decades long history of serving J40 communities and depth of knowledge of our target audience • Understand constituents needs and concerns • Communicate and educate on program benefits and build support • Identify contractors – veteran, woman or minority- owned that they may wish to engage	• 1-on-1 • In-person and virtual meetings with targeted populations • Distribution of fact sheets • Listening sessions to learning what benefits constituents & what brings trust
CAAs and Weatherization Partners	• Agency Capacity • IT and other weatherization systems currently in place • Marketing tactics • Identification of community leaders • Challenges to program participation • Ability/interest in braiding Weatherization with IRA rebate programs • Energy Auditor Capacity	
Utilities	• Current rebate offerings • Marketing tactics and ROI • High-performing rebate contractors • Proactive identification of labor shortages • Program integration/collaboration strategies	• Surveys to Utility program managers • 1-on-1 meetings • Contractor/trade ally workshops

Table 5: Stakeholder Engagements

Distribution of Resources

Nebraska will be required to develop program strategies that serve both single family and multi-family housing stock throughout the State. The U.S. DOE requirement is that no less than 10% of program funds be invested in multi-family housing. The Egis Team is working with numerous states to analyze a variety of factors that could help determine if a state wants to exceed that 10% minimum with its program offerings. Our program design team will work collaboratively with the NDEE team to thoughtfully analyze a variety of factors including energy burden by housing type, unmet need, synergies with other single family and multi-family programs, along with identification of an approach that minimize administrative expenses and maximizes the number of households served.

A Thoughtful Approach to Modeled vs. Measured Rebate Program Decisioning

The DOE Home Efficiency Rebate Program offers Nebraska a choice to implement a modeled or a measured path to calculate and verify the amount of incentive provided to each participant. The Egis Team has reviewed the program requirements and what the customer experience and program design elements would be for each path. Each path has benefits and potential drawbacks; our team is flexible and can work through the approach Nebraska elects to implement.

The Egis Team has developed a tool to assist states in the design implementation and evaluation of both modeled and measured IRA rebates programs.

Our approach solicits inputs, identifies key performance indicators (KPIs), analyses various facets of the contractor and applicant experience and facilitates and informs decision-making by state as to whether a measured, modeled, or hybrid program will best serve the State's constituents.

Marketing Strategy to Raise Awareness, Foster Trust & Encourage Program Participation

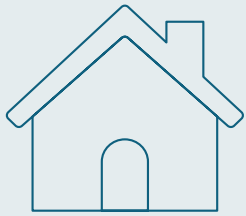
The Egis Team is working with numerous states to develop state-specific identities and brands for these IRA Rebate Programs. Our marketing team provides national expertise in the branding of federal and energy rebate programs along with unparalleled experience developing marketing initiatives within the State of Nebraska. Key components of this marketing plan include:

- Development of Nebraska-specific brand
- Earned and paid media strategies
- Marketing budgets
- Toolkits to be provided to program partners (contractors, CAAs, non-profits, community leaders)
- Specific J40 marketing and outreach tactics
- Identification of existing co-branding opportunities

The Egis Team has already completed these marketing plans for multiple states on IRA Rebate Programs and will share approaches other states are taking that could be customized to reflect the unique goals, objectives, and diversity of the State of Nebraska.

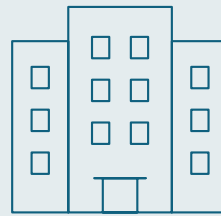
Identification of Program Pathways

We will work with the NDEE to determine appropriate models and delivery methods that make sense based on the State's driven goals and objectives. We have analyzed the diverse portfolio of opportunities across the State of Nevada and believe that the State may want to consider a multifaceted approach that considers some or all of the following program delivery models:



Single Family Units

- Manufactured Housing
- Retail Point of Sale (POS)
- e-Commerce
- 50122 New Build
- 50122 with Weatherization Assistance Program (WAP)
- Leveraging Tribal Allocations



Multi-family Units

- Non-congregate shelters
- PHAs
- 50122 New Build
- 50122 with WAP
- Leveraging Tribal Allocations

Having designed and delivered more than 750 energy rebate programs across the U.S., the Egis Team provides the State of Nebraska with a proven track record, processes, and procedures on each of the delivery models outlined above.

The Egis Advantage



Innovation and Risk Mitigation

Braiding weatherization with rebate funds, the Egis Team provides exceptional experience and understanding of each of these delivery models and can work collaboratively with the NDEE to develop a best-in-class, multifaceted solution to reach diverse program participants across the state.

Braiding Rebates with Weatherization

The Egis Team is currently participating in the U.S. DOE Technical Assistance Group (TAG) along with the state of Florida to develop a pilot project braiding weatherization with IRA rebates through the CAA delivery model. We will be incorporating our proven best-practices from our Illinois Weatherization Assistance Program (WAP)/Low-Income Home Energy Assistance Program (LIHEAP) braiding, as well as our Arizona IRA work that leverages that Arizona CAA contractor network for emergency heat pump replacements.

This pilot project will be completed in Q1 of 2025 in the state of Florida and uniquely positions the Egis Team to collaborate with the State of Nebraska and its weatherization network to deploy an impactful IRA rebate program.

Early Identification of Complimentary Programs

These IRA Rebate Programs provide the NDEE with an outstanding opportunity to collaborate with other public, private, utility, or philanthropic programs currently operational within the State of Nebraska. These partnerships can increase the impact within each participating household, accelerate and enhance program awareness and participation, decrease administrative expenses, close any cost share gap, and address pre-existing conditions that could preclude IRA Rebate eligibility.

The Egis Team will work collaboratively with the NDEE's team to identify appropriate partner agencies and programs to integrate into the overall benefits package for Nebraska residents.

In addition to coordinating with other agencies across Nebraska to provide a more efficient and easy rebate process for applicants, our funding experts will work collaboratively with the NDEE's team to identify funding sources that can be compliantly braided with the rebate dollars to close the cost-share gap, decrease the likelihood of applicant "walk away," and maximize the impact of all funding sources within each household.

The following programs and funding sources could be potential opportunities for the NDEE to maximize benefits for residents while expanding the reach of the energy rebate funds:

- HAF
- U.S. DOE Weatherization Funds
- Community Development Block Grant (CDBG) Formula funds
- Unencumbered Emergency Rental Assistance funds
- U.S. Department of Agriculture – Rural Development Housing Repair Loans
- Utility incentives
- Manufacturer's incentives
- American Rescue Plan Funds
- Nebraska Affordable Housing Program

This identification of braiding opportunities must also be coupled with a systematic approach to ensuring compliance with federal requirements for eligible expenditures and reporting. The Egis Team provides Nebraska with a comprehensive solution that ensures compliance and mitigates risk associated with duplication of benefits and potential federal clawback.

Coordinated Funding Streams

Complementing program rebates with other funding sources, like weatherization program funds, utility rebates, and financing, can break down cost barriers and make energy-efficient equipment purchases more affordable. We will leverage our national expertise to incorporate these other funding sources. New partnerships could also be identified to bring private and public funding sources into the energy efficiency market. The Egis Team can create partnerships with market actors to make financing more available and empower them with tools to help them assess the financial viability of projects. Property-Assessed Clean Energy (PACE) financing could also be leveraged where available.

Early Engagement & Coordination with Nebraska Utilities

Utilities throughout the State of Nebraska can play a multifaceted and vital role in helping shape and execute these IRA Rebate Programs. Early and thoughtful engagement with these stakeholders best positions the NDEE for success. Some areas of exploration with these utilities include but are not limited to:

- Utility data access agreements to simplify the experience
- Identification and examination of current efficiency/rebate programs
- Successful marketing strategies to drive program participation
- Identification of energy burdened households and communities
- Leveraging of pre-existing qualified contractor networks
- Opportunities for utility attribution

The Egis Team will work collaboratively with the NDEE and leverage our extensive network of relationships with Nebraska utilities to foster meaningful dialogue to help shape program design.

Workforce Development Planning

These IRA Rebate Programs provide an amazing opportunity to create meaningful jobs and careers in energy efficiency and electrification. The Egis Team provides national expertise in developing comprehensive workforce development strategies specifically targeting J40 communities and establishing partnerships with career and vocational training institutions to decrease administrative costs. Some high-level components of this plan include:

- Identification of job opportunities
- Identification of geographic or demographic focus
- Identification and communication with existing workforce development partners
- Review of existing and modern curriculum

With experience in workforce development expansion in numerous states, including various energy rebate programs, the Egis Team will work alongside the NDEE and other appropriate partners to maximize business opportunities for Nebraska's small businesses and residents.

The planning phase outlined above provides a solid foundation to guide the NDEE through the completion of their program application/narrative checklists and the development and completion of their Blueprint Plans.

Our Methodical & Simplified Approach to Expedite IRA Checklist

Through a collaborative approach with the NDEE, we will walk through the various sections and prioritize where input levels (high, medium, low) are required. Conducting this exercise early in the design process will assist in bringing in the appropriate resources at the appropriate time. We generally see that 80% of the narrative checklist is part of the turn-key solution and expertise we bring on Day 1. The remaining 20% of the narrative checklist requires a higher level of client input and a variety of discussions to talk through trade-offs and engage internal and external resources to drive the direction of the respective narratives. We take this 80/20 approach to show early wins and focus time on the areas of highest importance/impact while leaving more time to be spent defining the details during the implementation blueprint period of the project.

KEY CONSIDERATIONS FOR THE NDEE

- Higher low-income rebates and percentage of project costs
- Portion rebate funds allocated to low-income and multi-family
- Definition of J40/disadvantaged communities
- Conducting evaluation – NDEE or U.S. DOE
- Rebate levels for qualified electrification projects
- Modeled vs. Measured
- Confirm EER will automatically get installation rebates for multi-family buildings

The Egis Team provides industry-leading expertise and unparalleled experience designing IRA Energy Rebate Programs. The states of Indiana, Ohio, Arizona, Pennsylvania, South Carolina, and Florida have selected our team to design and deliver their energy rebate programs. We launched Arizona in late August 2024 and are in the final phase of the planning exercise with the State of Indiana. We anticipate their program launching by October 2024.

Additionally, we are currently designing and planning the Ohio programs with an anticipated launch date that aligns with the state's goal of January 2025. Our Nebraska program design team has been intimately involved with Arizona, Ohio, and Indiana and is uniquely well-positioned to provide the NDEE with an unparalleled understanding of all facets of IRA program design and deployment.

Implementation Blueprint *Approach*

② Create Outline for Each Plan

- U.S. DOE requirements
- Additional design elements necessary to create a thorough operational plan

② Identify Key Contributors for Each Section

- Internal
- External (e.g., NDEE discussion needed, stakeholder input, etc.)
- Create a list of questions & discussion topics to drive external inputs

② Drafting Section Requiring No External Input

- Incorporate relevant narrative checklist decisions and other resources
- Incorporate program framework documentation (as appropriate)
- Work with key contributors on these sections
- Provide completed sections during weekly work session for review & discussion

② Incorporate External Input into Remaining Sections

- Provide completed sections during weekly work session for review and discussion
- Provide full draft for review when complete

DOE *Submittal*

② Create outline for each plan

② U.S. DOE requirements

Program Plan Grounded in U.S. DOE Compliance & Approval

Through our work with the State of Indiana in Sprint Cohort 2 and, most recently, the States of Ohio and Pennsylvania in Cohort 5, our team has been working collaboratively with various senior leadership within the U.S. DOE. This collaboration provides us with a unique insight into how to facilitate a streamlined planning process and subsequent U.S. DOE approval of Nebraska’s application and blueprint. Most importantly, our recommendations to the State of Nebraska outlined in this proposal have been vetted by the U.S. DOE. The U.S. DOE has expressed support and confidence in our methodology and tactics.

The U.S. DOE and U.S. Department of Housing and Urban Development (HUD) have reviewed our strategy related to multi-family housing and believes it may serve as a “national blueprint” for all states to consider.

Overview of the Planning Process & Delivery of a Complete Planning Application

The final deliverable of the planning process is an approvable and actionable program application grounded in the U.S. DOE requirements. It is imperative to note that there are other required components besides the six U.S. DOE-required plans the state must complete to provide a compliant and implementable program. Our approach addresses the deliverables required for the RFP, the six plans required by the U.S. DOE, and other value-added plans necessary for operationalizing the rebate programs. This comprehensive approach is grounded in our experience delivering billions of dollars in federally funded programs and national expertise in designing and implementing more than 750 energy rebate programs nationwide. The table below provides a comprehensive list of U.S. DOE-required plans and the Egis Team’s essential components to an actionable program.

Our methodical approach to developing Nebraska’s home energy rebate programs is outlined on the following pages. Our technical approach, led by industry-leading experts, is grounded in the following:

- Compliance with U.S. DOE requirements
- Reducing energy costs for Nebraska households
- Meeting J40 requirements
- Thoughtful collaboration with Nebraska’s nine CAPs
- Integration with tribal communities and facilitate workforce development opportunities
- Maximizing contracting and job opportunities for Nebraska businesses and residents
- Simple and efficient applicant experience

We articulate a comprehensive and expedited approach to the planning phase, providing Nebraska with an approvable and actionable plan. This comprehensive approach offers the NDEE with the deliverables of all the required components for the program application, along with additional value-added plans, standard operating procedures (SOPs), and manuals that will be essential to deploying these programs.

Our approach to program implementation provides a multifaceted solution that maximizes the number of households served, thoughtfully braids additional funding sources, and deploys all allocated funding within five years of program launch.

DOE Required Plans	The Egis Advantage—Value-Added Plans to Operationalize Programs	
• Community Benefits Plan • Education and Outreach Strategy • Consumer Protection Plan • Utility Data Access Plan • Privacy and Security Risk Assessment • Market Transformation (MT) Plan	• Workforce Development Plan • Delivery Model Plan • Risk Mitigation Plan • Utility Coordination Plan • Installation and Equipment Specification Guide	• Environmental Compliance and Waste Stream Management Plan • Health and Safety Plan • Procurement Guide • Customer Service Plan

Objective/Purpose of Plan

Our objective will be to take a whole-community approach to maximize the impact of these energy rebate programs across Nebraska. This strategy engages diverse stakeholders and potential program partners to improve and accelerate participation and ensure positive project outcomes.

Experience with Community Benefits Plan Development

The Egis Team has designed and delivered public assistance and energy rebate programs across the country, which have exceeded participation and inclusion goals for LMI and diverse communities. These time-tested practices employed by our team consist of a robust outreach and engagement strategy, holistic program design, and incentivized contracting opportunities with XBE service providers within measurable and reportable systems.

Technical Approach to Plan Development

To begin the planning process, our program design team will work in tandem with key NDEE leadership to develop and scope the schedule and preliminary stakeholder list for the community engagement exercises. This cadre will work collaboratively to identify underserved/underemployed populations across Nebraska who would benefit the most from program offerings. Once this exercise is complete, the working group will engage in public comment sessions and town halls to solicit feedback from potential applicants, contractors, distributors, and other program partners. Focusing on transparency and full inclusion, the working group will publicly post its findings, plans, and intentions to drive community buy-in.

Engage Community & Labor

The Egis Team is well-positioned to drive diversity, equity, inclusion, and accessibility through initial community engagement, thoughtful program design, and creative contracting strategies. Our Community Benefits Plan is founded on engagement with local government units, their citizens, and existing labor groups. We will conduct town halls and listening sessions and send local units of government fact sheets and surveys that provide information regarding the program while soliciting input on their abilities to participate. The Egis Team will use this collaboration to educate cities and towns, gain buy-in, and identify in-need communities statewide. Based on our extensive experience working throughout Nebraska, we have proactively identified numerous stakeholders (Table 6: Community Stakeholders and Table 7: Nebraska Tribes) that will be critical to shaping the design of these rebate programs. They can include but are not limited to:

Communities		
· Faith-based institutions	· CAAs	· Non-profits

Table 6: Community Stakeholders

Nebraska Tribes			
· Omaha Tribe of Nebraska	· Ponca Tribe of Nebraska	· Santee Sioux Nation	· Winnebago Tribe of Nebraska

Table 7: Nebraska Tribes

Targeted Outreach to Areas With Highest Energy Burden

The Egis Team will develop and execute a statewide strategy to maximize awareness and facilitate participation in these critical initiatives. Additionally, we have proactively reviewed energy burden data and determined the following areas that may have the highest energy burden within Nebraska. These Home Energy Rebate Programs could most positively impact residents of these communities. Thus, it is imperative that we develop and execute a multifaceted outreach strategy to raise awareness and maximize participation within these communities. Many of these counties are very sparsely populated; therefore, a thoughtful and cost-effective approach that leverages pre-existing relationships with key community leaders will be critical to maximizing awareness and participation in these areas. These could include but are not limited to:

- Adams County
 - Box Butte County
 - Buffalo County
 - Cheyenne County
 - Colfax County
- Dakota County
 - Dawes County
 - Dawson County
 - Dodge County
 - Douglas County
- Gage County
 - Hall County
 - Lancaster County
 - Lincoln County
 - Madison County
- Platte County
 - Saline County
 - Sarpy County
 - Scotts Bluff County
 - Thurston County

Engage & Support a Skilled & Qualified Workforce

The Egis Team provides an expansive network of existing relationships with Nebraska educational and workforce development entities. We will build upon these experiences to have a thoughtful and collaborative approach. As part of this work, we will work collaboratively with the NDEE to facilitate communication with the following groups:

- Central Community College
- Mid-Plains Community College
- Southeast Community College
- Metropolitan Community College
- Northeast Community College
- Western Nebraska Community College

These programs provide an excellent opportunity to facilitate job creation opportunities for segments of the Nebraska community that experience chronic un/underemployment opportunities throughout Nebraska. Further, we could focus our energy on segments of the Nebraska population that experience chronic un/under-employment. One example is outlined in the graphic below, which illustrates labor participation within the tribal communities of Nebraska.

A Multitude of Job Opportunities

Throughout these programs, various skilled trade positions will be created. Some of these positions include:

- Electricians
- HVAC technicians
- Insulation workers
- BPI energy auditors
- Building analyst technicians
- Building analyst professionals
- BPI building science principles
- HERS raters

Expanding Energy Auditor Capacity

Nebraska has less than 10% of the energy auditors necessary to deploy these programs, especially in the more rural areas across the state. The Egis Team is well-versed in upskilling and certifying energy auditors. Our solution is thoughtfully partnering with CAAs, career and vocational training schools, and community colleges daily to facilitate the necessary capacity to execute energy rebate programs. We have proactively identified several of these entities and institutions throughout Nebraska, as outlined above.

Engaging the Contracting Community: Our goal for contractor outreach is to identify a network of qualified, competent, capable contractors interested in participating. The Egis Team provides the NDEE with an extensive network of relationships with trade associations, labor unions, various utilities, and other skill-based organizations throughout Nebraska's 93 counties, whose members are potential contracting partners for the program. Some potential partners could include:

- Associated General Contractors of America
– Nebraska Chapter
- Nebraska Builders and Contractors Association
- Nebraska State Home Builders Association
- Nebraska Concrete & Aggregates Association
- Nebraska Masonry Alliance
- Nebraska Electrical Contractors Association
- Nebraska Roofing Contractors Association

Promote Statewide DEIA & J40

We have a multifaceted approach to DEIA and J40. Our solution is grounded in targeted outreach to underserved populations traditionally qualifying for LMI-targeted assistance. Our team's proven strategies, recently used for the U.S. Treasury's Homeowner's Assistance Fund (HAF), position the state to meet J40 goals through broad targeted outreach. As our comprehensive marketing and communications strategy outlines, we will apply cost-effective methods to connect with historically disadvantaged communities to maximize participation and inclusion.

Leveraging Section 50123, we will engage local vocational, technical, community, and tribal colleges to implement training systems that bolster the local workforce, remove barriers to program participation, and create legacy jobs within Nebraska. The Egis Team has a comprehensive training curriculum to educate and certify energy auditors and other specialized tradespeople required for program success. To ensure program success and condense the overall schedule of the rebate program, we will implement these training strategies alongside program planning. This accelerated schedule ensures that residences can be assessed as soon as possible.

To maximize J40 participation and ensure equity in program design and implementation, we would encourage the NDEE also to facilitate collaboration with the following entities:

- Midlands African Chamber
- Nebraska Hispanic Chamber of Commerce
- Mountain Plains Minority Supplier Development Council
- Nebraska Commission on Latino Americans

Informational Meetings:

The Egis Team will work collaboratively with NDEE to develop a plan for informational meetings (virtual and in-person) with these entities within the first three months of the planning phase to inform them of the implementation of this program, outline the anticipated schedule of program launch, the estimated number of households served, and gather information from stakeholders who have previously implemented similar programs across Nebraska and in other states.

Stakeholder Meeting Analysis:

We will utilize these meetings to solicit valuable data, information, and real-world experience, which will help guide subsequent decision-making regarding the final program implementation. Our program delivery specialists will analyze and assess this data to inform the development of a final implementation strategy for the delivery of these program funds.

Engaging CAAs

The Egis Team will replicate this focus on J40 neighborhoods and communities around the state. To reach J40 communities, we will also work closely with the CAAs, representing eight agencies across all of Nebraska's 93 counties (Table 8: Nebraska CAPs). Additionally, we will lean into our existing relationships with low-income housing, non-profit, and social services organizations (Table 9: Nebraska CBOs and Community Partners) in Nebraska's major cities.

Nebraska CAPs

- | | |
|---|---|
| • Blue Valley Community Action Partnership | • Eastern Nebraska Community Action Partnership |
| • Central Nebraska Community Action Partnership | • Northeast Nebraska Community Action Partnership |
| • Community Action Partnership of Lancaster and Saunders Counties | • Northwest Community Action Partnership |
| • Community Action Partnership of Mid-Nebraska | • Southeast Nebraska Community Action Partnership |
| | • Western Nebraska Community Action Partnership |

Table 8 Nebraska CAPs

Nebraska CBOs & Community Partners

- | | |
|--|---|
| • Habitat for Humanity of Omaha | • Center for People in Need |
| • NeighborWorks Lincoln | • Community Action of Nebraska |
| • Omaha Economic Development Corporation | • Open Door Mission |
| • Family Housing Advisory Services | • Siena/Francis House |
| • Midwest Housing Development Fund | • Completely Kids |
| • Nebraska Housing Developers Association | • Youth Emergency Services |
| • Housing Foundation for Sarpy County | • Intercultural Senior Center |
| • Community Housing Development Corporation | • Omaha Home for Boys |
| • Nebraska Housing Resource, Inc. | • Boys Town |
| • NeighborWorks Northeast Nebraska | • Charles Drew Health Center |
| • NeighborWorks Columbus | • Legal Aid of Nebraska |
| • The Seldin Company | • Habitat for Humanity of Omaha |
| • Holy Name Housing Corporation | • Heart Ministry Center |
| • Affordable Housing Initiatives | • Food Bank for the Heartland |
| • CenterPointe | • Project Harmony |
| • CEDARS Youth Services | • Omaha Healthy Kids Alliance |
| • New Community Development Corporation | • Heartland Workers Center |
| • Heartland Family Service | • Together Omaha |
| • Catholic Charities of the Archdiocese of Omaha | • Inclusive Communities |
| • Lutheran Family Services of Nebraska | • Immigrant Legal Center |
| • Together Inc. | • OneWorld Community Health Centers |
| • The Salvation Army of Omaha | • Nebraska Urban Indian Health Coalition |
| • United Way of the Midlands | • Nebraska Children and Families Foundation |
| • Nebraska Appleseed | |

Table 9: Nebraska CBOs and Community Partners

DEIA & J40 for Job Opportunities:

Our team's outreach messaging includes opportunities to apply for assistance and receive job training and job placement opportunities afforded by the program. The Egis Team possesses refined training curricula that can be used by and alongside technical schools, community colleges, and the tribal college system to upskill existing laborers and thoroughly train inexperienced candidates.

DEIA & J40 for Contractors:

Through collaboration with the utilities, the Egis Team will identify existing high-performing XBE installation contractors in the state. Our team is committed to fostering partnerships between large construction managers and smaller existing contractors to ensure hindrances to program participation are removed.

Contractor Outreach:

The goal of the contractor outreach is to identify and activate a statewide network of qualified, competent, capable contractors interested in participating in the program application.

Comprehensive Approach to Contractor Identification & Engagement:

The Egis Team provides the NDEE with an extensive network of relationships with trade associations, labor unions, various utilities, and other skill-based organizations throughout Nebraska's 93 counties, whose members are potential contracting partners for the program. Members are potential contracting partners for the program. These include but are not limited to:

- Associated General Contractors of America
 - Nebraska Chapter
- Nebraska Builders and Contractors Association
- Nebraska State Home Builders Association
- Nebraska Concrete & Aggregates Association
- Nebraska Masonry Alliance
- Nebraska Electrical Contractors Association
- Nebraska Roofing Contractors Association

Informational Meetings:

The Egis Team will host virtual and in-person informational sessions with these organizations and their members to inform them of the program's existence and outline the anticipated schedule of program launch, the estimated number of households served, the expected number of contracting opportunities, and the overall program budget.

The Egis Team will utilize these forums, as well as widely distributed contractor surveys, to solicit valuable data and information (experience, workforce, capacity, XBE designation, J40 locations, and others from the contracting community), which will serve to guide subsequent decision-making regarding the final contractor engagement strategy.

Finalizing Contractor Strategy:

Our program delivery specialist will analyze and assess this data to develop a contractor engagement strategy for the NDEE. This assessment will determine contractor capacity, maximize contractor opportunities in the state, right-size contracts for contractors, workforce development gaps, J40 contractors, XBE/DBE goal attainability, and geographic gaps.

The Egis Advantage



Innovation, Risk Mitigation & Cost Savings

- A multifaceted approach that ensures J40 compliance
- Establishes curriculum to partner with education institutions in historically disadvantaged communities
- Mentor-protege program to foster the growth and development of XBE contractors
- Longstanding and extensive network of valuable market partner and stakeholder relationships across Nebraska

Education & Outreach Strategy Plan —

Duration: 60 Days

Objective/Purpose of Plan

The Egis Team will develop an intentional and multifaceted strategy to educate the public and various stakeholders on the benefits of the Home Energy Rebate Programs while meeting and exceeding the minimum required components:

- Description of planned activities for household outreach (channels and partnerships)
- Timeline for execution of outreach activities
- Estimated outreach and education budget

We will provide outreach beyond the minimum requirements which include, but are not limited to, workforce development, development of training and certification programs, extensive partnerships with local and trusted entities, facilitation with the tribal communities and colleges, branding packages, J40 community identification, and outreach.

Experience with Education & Outreach

We have unparalleled experience designing and implementing multifaceted communication and outreach strategies for the hundreds of energy rebate and individual assistance programs administered nationally.

Technical Approach to Plan Development

The Egis Team has proactively developed a preliminary plan list of stakeholders and methods of communicating these programs to various audiences. Outlined below is a broad overview grounded in national expertise in federal and energy rebate program management and decades of experience living and working in communities throughout the State of Nebraska.

Education & Outreach to Households

Developing a Brand for the Nebraska Energy Rebate Program

The Egis Team will conduct a learning session with the critical stakeholders in the energy industry, faith-based communities, chambers of commerce, cultural organizations, and refugee assistance organizations to develop a consensus on:

- Goals
- Objectives
- Strategies
- Tactics
- Key Nebraska-based performance indicators and success metrics

For example, we developed the following brand for the Indiana Home Energy Rebates program located below:



Campaign Messaging & Design

To drive targeted acquisition, we will draw on our experienced creative team to develop an innovative and recognizable campaign identity that resonates with identified target audiences.

An audience-centric message framework capturing key messages, messengers, and channels that are compelling for each audience, and campaign identity concepts that will be refined to a single creative narrative are included in this phase.

Implementation would consist of creative video, voice, and social ad content.

Campaign Execution

The Egis Team will execute all aspects of the campaign strategy, including paid media, traditional public relations and grassroots marketing, and owned media. **Based on our extensive experience in other federally funded individual assistance programs, we see that, on average, it takes a minimum of seven times for a target consumer to see an ad and then take action on the message.** We will ensure that target consumers see our ads seven times through the following:

Paid Media—Generating Awareness Through Advertising

Our team will develop a comprehensive paid media plan to generate awareness through advertising. It will be responsible for all placement and coordination of advertising across multiple media channels on connected devices and offline experiences throughout Nebraska's singular designated market area. Tactics could include:

Digital Advertising, including Social Media, Digital Display, and YouTube: Tactically, digital and social media ads will be deployed first to generate broad awareness and capture user data. Then, we will use ad targeting, search and re-targeting, and geo-targeting to place ads in specific J40 neighborhoods designed to convert users (i.e., apply).

Over-the-top (OTT): Television, Pre-roll Advertising, and Programmatic Radio: Broadcast television and radio are shrinking markets. Our team will instead use OTT, pre-roll ads, and programmatic radio (e.g., Pandora and Spotify) to generate broad awareness and capture audience data, allowing for targeting, geo-targeting, and re-targeting.

Out-of-home Advertising (Billboards, etc.): Out-of-home advertising is a layer that reinforces other offline and online efforts and is incredibly impactful when reaching underserved and minority audiences.

Public Relations (PR)

PR will include earned media by engaging with print and broadcast reporters to help explain the program and the need for eligible Nebraska residents to participate in the energy rebates program, establishing a partner coalition to serve as third-party advocates that validate the program.

We will also develop a coordinated grassroots community relations team to appear at events throughout Nebraska to engage target audiences, particularly J40 audiences.

Owned Media

The Egis Team will design and build all necessary elements of a microsite to educate and convert users while capturing robust data to serve re-targeted advertisements.

The Egis Team will set up new social media pages for the campaign, leveraging social channels that frequently target audiences, such as Instagram.

Maximize Awareness & Participation Through Categorical Eligibility

The U.S. DOE has encouraged states to utilize categorical eligibility for these energy rebate programs. Our team will work collaboratively with the NDEE and other state agencies to maximize program participation with Nebraska residents currently participating in Low Income Home Energy Assistance Program, Low Income Household Water Assistance Program, TANF, Supplemental Nutrition Assistance Program, and other federal programs that meet the eligibility criteria. We can develop outreach tactics that these other programs can utilize to accelerate program participation for those most in need.

Developing Program Collateral & Printed Materials

We will collaborate with the NDEE to design and distribute printed materials for communities with limited access to online resources to raise program awareness and participation. Our initial market research has identified several communities that lack broadband access and require more comprehensive outreach, including printed materials.

Our team brings the NDEE extensive experience in marketing, outreach, and engagement specific to increasing public awareness of and demand for energy rebates and other federally funded individual assistance programs. Using comprehensive market analysis, we will begin by gaining an understanding of previous applicant participation in energy programs, statewide customer demographics, current service provider coverage, and existing community partner relationships. The data will inform how we target underserved regions and customer segments and define marketing and outreach goals and efforts. This analysis will also identify capacity-building opportunities for community partners and local contractors who can provide customer outreach, education, screening, and enrollment.

Multi-Channel Program Resource Deployment

Our multifaceted and multi-channel methods will engage the applicant population, connect the unemployed and underemployed with potential job opportunities, and raise awareness with the contracting community.

Program Websites	Community-based Outreach	Call Center Services
Building and managing program websites for the NDEE that provide information on the programs, including how to participate, the rebates available, and how to apply	Deploying a community-based outreach strategy that provides direct, in-person engagement across the state, but especially in harder-to-reach communities	Contact center services that are conveniently accessible with translation capabilities and assist applicants with completing applications

Thoughtful Outreach Plan Development



- ⇒ **Income-Qualified & Underserved Communities:** Our development process begins with research to understand market needs and where program resources are needed most. Our plan prioritizes income-qualified and underserved communities. Our team’s work within these communities has taught us that we can offer health and safety measures beyond energy-saving opportunities to improve indoor air quality and combustion safety, avoid mold infestations, and detect carbon monoxide. While we would not exclude residents who do not meet income qualifications, our recommendation would be to prioritize funds and services to residents who need it most based on income needs, age, health issues, and other qualifying factors we can work with the NDEE to define.
- ⇒ **Geographic Targets:** We recommend layering geographic priorities to focus resources/funds. Public resources, like DOE’s Low-Income Energy Affordability Data (LEAD) Tool, Climate & Economic Justice Screening Tool (CJEST), U.S. Energy Information Administration (EIA) data, and ArcGIS Living Atlas of the World, have incorporated census tract data to identify low-income communities nationwide.
- ⇒ **PHAs:** We bring experience working with PHAs and low-income property managers. Leveraging relationships and other public resources, we will work with NDEE to establish a plan to get resources to residents who need them most.
- ⇒ **Community-Based Coordination:** Our plan for NDEE’s disadvantaged communities will utilize trusted community leaders - like Nebraska’s nine CAAs, partner with local organizations and faith-based institutions, and conduct outreach events in diverse neighborhoods to build trust, address concerns, and maximize participation.
- ⇒ **Utilities:** We will leverage existing relationships at Omaha Public Power District and MidAmerican Energy, industry best practices, and proven marketing tactics to partner with utilities, municipalities, and cooperatives to maximize awareness and drive program participation. Examples of this outreach and marketing will include utility bill inserts, advertising on utility websites, and leveraging the limited number of rebate programs currently operational in Nebraska.

Contractor Outreach Strategy

Planned Activities for Contractor Outreach

The Egis Team knows that contractor capacity and interest in these programs will be a challenge to the timely deployment of program funds. It is imperative that we thoughtfully engage the contracting community on a statewide basis, inclusive of existing WAP partners, as well as contractors that have not historically participated in federally funded or stated administered programs. The Egis Team has proactively identified numerous data points that we would seek to collect through this contractor engagement. They include but are not limited to the following:

- Familiarity with energy rebate programs
- Skillset and expertise
- Financial capacity
- Familiarity/experience with government contracting
- Workforce capacity
- Labor shortages (specifically skilled trade positions required for installation)
- Geographic reach
- Designation as minority, woman, and/or veteran-owned business

Outreach Channels

The Egis Team has extensive experience and partnerships among the Nebraska contracting community. We will utilize proven strategies to engage, educate, and recruit contractors and skilled trade professionals interested in participating in the program.

Schedule for Executing Education & Outreach Activities

The Egis Team knows raising awareness of these programs will require a multifaceted approach during the planning phase and throughout the lifecycle of these initiatives. We would expect to complete the planning, outreach, and engagement within the schedule identified in the RFP; however, we believe ongoing contractor and community engagement will be critical to the timely distribution of funds and the success of these rebate programs. We will work collaboratively with the NDEE to develop both an earned and paid media strategy that will ensure continued engagement and interaction with these programs.

Budget

The Egis Team will work collaboratively to develop a cost-effective budget that drives applicant participation. We will utilize methods and tactics that drive down applicant acquisition costs, thus allowing us to serve more homes throughout this program's lifecycle. Further, we will look for co-branding opportunities to further reduce applicant acquisition costs. We have numerous successful strategies that we look forward to discussing with the NDEE.

Our approach harnesses the critical role and understanding community partners have of their communities to help us develop outreach and program promotion messaging and collateral, incorporating their input and enabling them to use their trusted name and brand through co-branded pieces. We know that community partners can best connect with, reach, and serve their constituents and clients in ways that take into consideration the barriers that must be overcome. In our design, the program's network of community partners will serve as program ambassadors in disadvantaged communities, helping residents understand, access, and enroll in services. We will support community partners and local contractors with training and resources to educate, build awareness, and connect customers to the right resources. Empowering community partners to assist customers encourages greater participation by aligning their commitment to their clients and ensuring customers take full advantage of the services and support made available by the NDEE.



Innovation, Risk Mitigation & Cost Savings

The Egis Advantage

- Leverages previous energy rebate and federally funded program administration practices and tactics
- Maximizes low-cost, high-impact strategies to reduce administrative burden and increase benefit funding
- Ability to control applicant pipeline and contractor workflow without overspending/committing
- Proven tactic to engage J40 communities
- Engages strategic partners to market the program cost-effectively

U.S. DOE Recognized Leaders in Consumer Protection Planning

The U.S. DOE recently requested that the Egis-drafted Consumer Protection Plan be used as the national model for other states to replicate based on its comprehensive nature. Our multifaceted approach examines every aspect of the business process to ensure consumers are protected prior to, during, and after program participation.

Objective/Purpose of Plan

Nebraska's Consumer Protection Plan provides guidance to achieve the highest quality customer experience. This publicly available plan, subject to review on an annual basis, will include the following components:

- Mechanism to solicit customer feedback
- Resolution procedures
- Data review for completed projects
- On-site inspection standard procedures and documentation
- Contractor eligibility and prequalification requirements
- Installation quality assurance and closeout
- Processes and mechanisms for continuous process improvement

Experience with Consumer Protection Planning

The Egis Team provides Nebraska with a thoughtful and comprehensive consumer protection plan per U.S. DOE requirements, grounded in industry best practices. Our methods and procedures have been successfully implemented on over 750 energy rebate programs across the U.S. and in billions of dollars of federally funded housing repair programs.

Technical Approach to Plan Development

Managing customer feedback is paramount to programmatic success. Our comprehensive approach to customer feedback allows applicants to evaluate every aspect of our business process, thus allowing the state and our team to consistently analyze, assess, and facilitate process improvement. Our consumer feedback plan comprises several pillars and exceeds the federal requirements outlined in the U.S. DOE's Administrative and Legal Requirements Document (ALRD).

Educate & Inform

Through our experience designing and implementing energy rebate programs across the U.S., we have found that early education and information regarding eligibility, benefits, and financial implications related to future energy bills decrease applicant confusion and facilitate a better applicant experience. We will provide program information and case studies on the program website, a fully operational call center, extensive training for our energy auditors, and partnerships with trusted community stakeholders, like CAAs, to facilitate this process.

Consumer Feedback

We will solicit consumer feedback to analyze and evaluate the customer service experience of the applicant's journey. Our customer feedback survey explores the applicant experience related to our call center, the application process, our case managers, the energy auditors, the scheduling, completion, quality of the construction work, and the overall benefit of the program. Our customer service lead will review all feedback provided by applicants and meet with each business line lead and each of the program's contractors at prescribed intervals. The NDEE must also be included in those discussions. We provide monthly reports and publicly display our percentage of satisfied customers on the program's website.

Resolution Procedures

Not only will the Egis Team draft and enforce written resolution procedures, but we possess several differentiators that reduce conflict.

1. Our contract engagement strategy and program delivery model drastically reduce the likelihood of conflicts between contractors and applicants.
2. Our Closed Contractor Network (CCN) model vets and prequalifies contractors with the appropriate licensing, insurance, certifications, customer service, and performance backgrounds. To maintain control over the applicant experience, we strongly discourage using aggregators.
3. Our thoughtful workforce development systems ensure energy auditors possess certifications in BPI standards and training in customer service.
4. To drive transparency and participation, the Egis Team performs initial energy audits in the presence of the applicant, our energy auditor, and the contractor's representatives.
5. The installation of complex systems and those within walls will be observed during construction.

Data Review

We have established processes to review applicant and project data to accurately process applications and pay rebates in strict compliance with program rules. Our process involves built-in data validation to confirm compliance and to check for incomplete applications. We have automatic calculations built in to calculate energy savings and rebate amounts and a stratified review matrix that applies additional reviews based on the rebate amount.

On-site Inspection

Based on our experience with federally funded programs, we encourage Nebraska to develop inspection requirements that exceed those outlined in the U.S. DOE ALRD. Our standards provide a better applicant experience, reduce change orders and the likelihood of punch lists, accelerate the applicant experience, and facilitate better compliance with the Buy America Act. We will collaborate with the NDEE to create a cost-effective onsite inspection protocol and offer contractors onsite and virtual inspection tools connected to iEnergy with the ability to perform assessments, track project incentives and measure installation, generate site reports, and quickly obtain final signatures to initiate the rebate process.

Contractors & Other Partners

Our contractor engagement and oversight approach is grounded in past successes, delivering billions of dollars in home repair and improvement programs. As outlined in our education and outreach plans and our delivery model discussion, we provide Nebraska with a federally compliant contractor engagement strategy that ensures compliance, reduces administrative costs, maximizes workforce development opportunities, and maximizes opportunities for Nebraska-based businesses to participate in the program.

Our federal procurement specialists will work collaboratively with the NDEE staff to develop standard terms and conditions, progress clauses, and liquidated damages that conform to the federal guidelines outlined in the ALRD and build upon lessons learned on previous programs similar in scope. As our contractor outreach plan outlines, we will engage in extensive outreach to maximize contractor awareness and interest during the Program Design Phase and engage contractors who meet our criteria for a prescribed period while developing policies and procedures in collaboration with Nebraska to facilitate the inclusion of additional contractors throughout the program.

Contractor Performance Monitoring

We will provide Nebraska with direct contractor supervision and mandatory monthly contractor meetings to discuss work performed and any quality control issues that may arise and develop performance improvement plans where necessary. We have found that this approach significantly decreases the likelihood of a contractor being delisted while maintaining the highest project delivery standards.

Installation

Our Quality Management Plan incorporates proactive strategies to ensure projects are installed correctly the first time to ensure optimal performance and energy savings. Through our participation in the U.S. DOE, American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE), Air-Conditioning, Heating, and Refrigeration Institute, American Council for Energy-Efficient Economy, and various regional working groups, we will monitor efficiency standards as they change over the lifetime of the programs.

Continuous Improvement

The Egis Team will implement procedures to facilitate continuous improvement throughout program implementation, which is essential for the growth and success of the programs. Outlined below are the facets of our business process and the fashion in which we monitor each to drive improvement:



Marketing:

Test and monitor the performance of every ad dollar spent for effectiveness, J40 engagement, ad clicks, clicks to apply, conversion rate, and conversion cost.



Call Center:

Gross call volume, average hold times, average call times, calls answered vs. abandoned, and the reasons for calls will all be tracked during the program.



Case Management:

Metrics include number of applications reviewed, accuracy of eligibility determinations, and caseload balancing across staff members.



Energy Auditors:

Review customer service feedback forms, review inspection reports, and share lessons learned and best practices across the program portfolio.



Contractors:

Process improvement is driven through our mandatory contractor meetings. Metrics discussed in these meetings include completed installations, the current number of task orders assigned but not closed, the aging of set task orders, inspection pass/fail rates, and customer survey feedback.



Financial Controls:

Number of contractor invoices per payment cycle, amount reimbursed per contractor, aging of invoices submitted vs. paid, and amount paid per household.



Customer Feedback Surveys:

Analyze and provide client reports summarizing customer feedback surveys' findings to attain our standard 97% customer satisfaction rate.



Risk Mitigation & Reduce Costs

The Egis Advantage

- Decreases change orders
- Reduces administrative expenses through the CCN
- Contractor task orders are created by the Egis Team, not by installation contractors
- Our strategy guarantees control, monitoring, and process improvement for all facets of the program
- Enhances contractor oversight
- Increases transparency
- U.S. DOE recognized leaders in consumer protection planning

Objective/Purpose of Plan

The Utility Data Access Plan is grounded in risk mitigation, ensuring any PII is maintained safely and securely and appropriate data protection protocols are established, monitored, and adhered to.

Experience with Utility Data Access

The Egis Team provides Nebraska with extensive experience working with and managing utilities and utility customer data. Our team works with hundreds of utilities across the U.S. daily and has extensive experience managing PII on billions of dollars of federally funded programs nationwide. Our SOC2 Type II systems, processes, and procedures provide the highest security standards and mitigate risk to Nebraska.

Technical Approach to Plan Development

Our approach is grounded in federal compliance and the requirements outlined in the Utility Data Access Guidelines issued by the U.S. DOE (Table 10: Key Components of the Utility Data Access Plan).

Key Components of the Utility Data Access Plan	
· Definition of energy consumption data to be collected and purpose for collection · Consumer consent processes · Data field requirements · Timing of data exchanges	· SFTP data exchange processes · Data access limits and restrictions · Physical and electronic document storage processes and requirements · Data back-up processes

Table 10: Key Components of the Utility Data Access Plan

Examples of utility data we can collect and analyze for consumers include:

- Customer Data: Account Name, Account Number, Address
- Usage Data: Account Number, Meter ID, Date/Time, Energy Unit, Read Code, AMI Data
- Other Possible Data (Optional for Added Functionality): Bill Cycle Calendar, Monthly Bill Data, Tariff Data, Load Control Event History, Load Control Participation, Green Button Data

The Utility Data Access Plan will require our team to collaborate and coordinate with a variety of utility interests (Table 11: Utilities, Co-ops, and Public Power Districts). They may include but are not limited to:

Utilities, Co-ops, & Public Power Districts		
Electric Utilities · Black Hills Energy · Northern Natural Gas · Northwestern Energy · Aquila (now part of Black Hills Energy)	Public Power Districts · OPPD · LES · MUD · Loup Power District · Norris Public Power District · Cuming County Public Power District · Butler Public Power District · Southern Public Power District · Tri-State Generation and Transmission Association	· Howard Greeley Rural Public Power District · Perennial Public Power District · Dawson Public Power District · Twin Valleys Public Power District · Cornhusker Public Power District · Northwest Rural Public Power District · Panhandle Rural Electric Membership Association · Chimney Rock Public Power District · Niobrara Valley Electric Membership Corporation

Table 11: Utilities, Co-ops, and Public Power Districts

The Utility Data Access Plan outlines how we will use SFTPs to send and receive sensitive customer information, including all documents containing PII. In addition to data exchange, data access policies are another critical component of our Utility Data Access Plan we develop. The plan will detail access restrictions for approved SFTP users to view, upload, or download sensitive information. We will limit access to our team members assigned to a project. Each user’s access is limited only to appropriate folders that pertain to their work.

The plan will also include policies around safe and secure document storage for physical and electronic documents. Our team stores encrypted data in a secure Cloud environment, encrypts files and drives, and securely backs up data for real-time backup service. Data and documents received via online applications, SFTP, and bulk project data uploads will be securely stored and accessible through administrator portals in iEnergy. We leverage modern infrastructure, monitoring, security tools, and processes to protect sensitive client information. An annual SOC2 Type II audit certifies the expected level of security, tools, and processes are in place. Our software solutions use 256-bit secure socket layer encryption to protect data and documents in transit and storage. Secure, role-based access allows users different security privileges, including project managers, customers, and industry and contractor partners. Audit trails are available at various levels using transaction, user, and system logs. Specific to the iEnergy platform we will use for program data management and processing, our data privacy and information security program and practice focuses on shielding and sharing information appropriately and lawfully while providing confidentiality, integrity, and availability. The iEnergy operations team performs nightly incremental and weekly full data backups. They store data backups onsite and offsite within the continental U.S. and encrypt data stored offsite via industry-standard AES 256-bit encryption for data at rest.

The Egis Advantage	 Risk Mitigation & Reduce Costs
	· Our SOC2 Type II systems and our processes and procedures provide the highest standards of security and mitigate risk to Nebraska · Our system process and procedures comply with U.S. DOE requirements and are currently operational with utilities nationwide · Streamlines the planning and integration to accelerate the operation of these rebate programs · Already incurred the costs of achieving SOC2 Type II compliance and will undergo an annual audit to maintain security tools and processes

Privacy & Security Risk Assessment Plan

Duration: 90 Days

The Egis Team's Risk Assessment and Management Program Policy will describe the practices we have in place to identify new business and technical risks and how often those risks are reviewed and mitigated.

Objective/Purpose of Plan

The Egis Team is proactive in our approach to risk management, balancing the cost of managing risk with anticipated benefits and undertaking contingency planning if critical risks are realized. Our security and IT team members will continuously work to ensure the confidentiality, integrity, and availability of essential systems and organizational data. To provide a secure, available infrastructure requires the Egis Team to identify and manage risks. We believe that effective risk management involves commitments to:

- The confidentiality, integrity, and availability of team infrastructure and services from senior management
- The involvement, cooperation, and insight of all team members
- Initiating risk assessments, starting with the discovery and identification of risks
- The thorough analysis of identified risks
- A strategy for the treatment of identified risks
- Communicating all identified risks to the company
- Encouraging the reporting of risks and threat vectors from all Egis Team members

The Egis Team believes that the following events can trigger a risk assessment to occur:

- A significant and major change to existing infrastructure, product, contract, or business practice
- A significant amount of time (e.g., a year) has passed since the last risk assessment

Risk assessments can be as high level or detailed to a specific organizational or technical change as our stakeholders and technologists see fit.

Experience with Privacy & Security Risk Assessment Plans

The Privacy and Security Risk Assessment Plan we have in place for iEnergy complies with varied client-specific requirements. It is designed to ensure service level agreements that cover 99.9% of system availability. We have also developed plans that define the following:

- Setup for data replication and disaster recovery to prevent system disruption
- Role-based access to iEnergy to manage information access
- System monitoring and alert processes
- Multi-factor authentication processes and requirements
- System logging and auditing features
- Performance of security and vulnerability testing

Technical Approach to Plan Development

This Risk Assessment and Management Program Policy applies to technical processes and practices, organizational communications, financial systems, and data stored, accessed, maintained, or managed on Egis Team-owned or allocated infrastructure. Risk assessments should evaluate systems under the Egis Team's control. Our risk assessments may also include an analysis of business practices, procedures, and physical office spaces. Vendor risk assessments are covered under our Vendor Management Policy, which consists of a risk assessment targeted at a vendor's security, business practices, legal commitments, and insurance postures. The policy will include the following elements:

- Risk mitigation standards
- Risk owner assignments
- Risk assessment processes

Our software platform applies industry and technology best practices to ensure the security of customer data. The iEnergy software undergoes an annual SOC2 Type II audit to review internal controls for security, confidentiality, processing integrity, privacy, and availability that are applied and maintained to meet the objectives consistently.

The Egis Advantage



Risk Mitigation & Reduce Costs

- Established software platform used to capture participant, project, energy savings, rebate, and budget data for over 100 utilities nationwide, manage over 750 energy programs, and pay over \$1.9 billion in energy rebates
- Undergoes rigorous, industry standard security auditing
- Provides full program visibility to the NDEE and Egis Team program leaders
- Highly configurable to meet the NDEE and U.S. DOE needs and requirements
- Securely exchanges utility data today

Objective/Purpose of Plan

MT in practice involves:

- Understanding market barriers
- Identifying leverage points
- Implementing targeted strategies
- Measuring key market progress indicators
- Ensuring the desired changes persist

Our MT plan will describe the strategies, assumptions, and data needed to quantify the MT results. Developing an MT Plan for the 50121 and 50122 programs will look for additional benefits that will persist over the long term and across Nebraska.

Experience with MT Development

As the current administrators of the Statewide California Market Transformation Administrator and the North American Gas Heat Pump Collaborative, our team brings unparalleled skills and experience in planning, implementing, and assessing MT. Our staff also led the start-up for the Northwest Energy Efficiency Alliance – one of the leading MT models in the country, the Midwest Market Transformation Collaborative, and other MT efforts across the country.

Technical Approach to Plan Development

Even though the U.S. DOE requires an MT plan to be developed one year after receiving funding, the Egis Team encourages the NDEE to consider planning and integrating this plan into the design before the program launch.

Leveraging our team's experience priming markets for MT and successfully achieving transformation goals, we will work throughout the program implementation period to establish the infrastructure required for the programs to have lasting impacts beyond rebate offers. The U.S. DOE has identified one requirement and several goals for the MT Plan; these include:

② Plan Requirement - Impacting Home Value:

- Enabling the market to recognize the value of homes that have been upgraded through the Home Energy Rebates, including at the time of sale/rental

② Support the Following Goals:

- Employ cost sharing, braiding, and coordinated financing of home energy upgrades
- Utilize rebate programs to enable new business models in partnership with private capital for monetizing grid benefits
- Explore new self-sustaining business models for home energy

To develop the MT Plan, we will:

-  Evaluate certification programs, like the U.S. DOE Home Energy Score (HES), as tools to measure how energy upgrades funded by the programs impact home values
-  Investigate other funding sources, like financing, to further break down cost barriers and make qualifying equipment purchases more affordable
-  Assess the workforce development components that must be integrated into our MT Plan to produce a local workforce capable of supporting energy upgrades beyond the program
-  Connect with utility demand response programs to outline approaches we can integrate into program delivery to maximize long-term grid benefits

Impacting Home Value

Through certification programs like the U.S. DOE HES, the homeowner will receive an assessment report that captures the upgraded high-performing features, such as ENERGY STAR® appliances, HVAC equipment, and heat pump water heaters. They will also receive a score.

The score gives homeowners, buyers, and renters a low-cost, reliable method to understand a home’s energy efficiency. A recent study by the U.S. DOE’s Lawrence Berkeley National Laboratory found that a one-point increase in HES was associated with a 0.5% increase in sale price. These sale price premiums drive consumer interest in efficiency. They can help Nebraska maximize the impact of the IRA rebate programs by creating a legacy of long-term market demand after rebates are exhausted.

Third-party certification drives homeowner demand for energy efficiency by ensuring that the improvements made are reflected in the home’s resale value. Real estate agents use this information in the seller’s disclosure as marketing materials when listing updated high-performing homes.

Coordinated Financing

Program rebates complemented by other funding sources, like financing, can break down cost barriers and make energy-efficient equipment purchases more affordable. Rebate programs can amplify demand and uptake of energy efficiency project financing. We have national experience and expertise in developing financing case studies. The Egis Team can create partnerships with market actors to make financing more available and empower them with tools to help them assess the project’s financial viability, identify new partnerships to bring in private and public funding sources into the energy efficiency market, and leverage PACE financing, where available.

Workforce Development

To transform the market, we also need to ensure that there is a qualified workforce to support the transformation. Our MT Plan will detail how we will provide resources and training to prepare workers for stable careers in the clean energy sector and the program support they will receive to grow healthy businesses and careers well past the lifetime of these programs. We will leverage U.S. DOE funding by infusing workforce development into our program delivery strategy. Workforce development may take various forms, including:

- Building program awareness and technical knowledge while bolstering the business and marketing acumen of supply chain partners
- Setting up training in targeted geographic locations across the state to expand technical skill sets in high-potential areas or under-served locations
- Ensuring supplier diversity and inclusive procurement and partnership practices
- Targeting local workforces in under-served and hard-to-reach communities through partnerships with CBOs

Grid Benefits

Residential customers with electrified homes increase the need for and benefits from participating in demand management events that help control daily and seasonal energy use peaks. With usage peaks aligning with energy cost peaks, customers receive economic benefits from participating in utility demand response (DR) programs through participation incentives. Regulators in a handful of states have even created a market for the aggregation of devices into what is known as virtual power plants.

With Section 50122 further driving the electrification of buildings, we fully expect an increasing need for DR programs. The IRA rebate programs create an exceptional opportunity for customers to opt-in to programs focused on managing grid resources. Through our experience across the country with program design, market potential studies, program management, and measurement and verification, we will work to identify ways to support and coordinate with energy providers to provide consumers with opportunities to participate in utility programs that achieve broader grid benefits.

The Egis Advantage

 Risk Mitigation & Cost Savings

- Added assurance of and confidence in success for Alabama based on our similar experience with statewide MT initiatives
- Proactive approach to MT plan development to ensure integration and alignment with program delivery
- Existing templates and tools for MT planning and tracking to reduce administrative expenses
- Expertise in understanding grid benefits of MT through the ability to leverage the Egis Team's grid and demand management teams

Value-Added Plans to Operationalize Implementation

While the plans below are not U.S. DOE-required plans, our experience developing energy rebates and federally funded programs across the U.S. has shown us that these plans are necessary precursors to operationalizing required programs, ensuring the efficient and effective delivery of the home energy rebate programs.

Workforce Development Plan —

Duration: 120 Days

Upon review of Nebraska's Training for Residential Energy Contractors (TREC) application during the Planning phase, the Egis Team's Workforce Development Plan will detail our approach to engaging market actors to support and develop a skilled workforce to support program delivery. The plan will also include our timeline and approach for outreach and engagement with market actors and stakeholders to understand needs, gaps, and available services with which we can coordinate.

Objective/Purpose of Plan

Local workforces – including contractors and community organizations – already serve residents across Nebraska and are critical to ensuring IRA funds reach their intended recipients. Our Workforce Development Plan will detail how we identify and engage the local workforce to close specialty, knowledge, and coverage gaps across the state. By engaging with local market actors and guiding them to a new energy industry future, we will help Nebraska produce and nurture a competent workforce to help achieve the objectives of the Homes Efficiency Rebate programs.

Experience with Workforce Development

Our team is working across the country to build local workforces in a way that expands their skill sets and capacity so they can better support energy-saving programs. Locally, our team includes professionals currently working with the NDEE on various workforce development initiatives, such as energy code training. Our focus on workforce development and engagement also ensures that they can maximize the amount of project-dedicated funds that are channeled back into local communities and economies. Examples include:

- Prioritizing J40 communities and rural regions for workforce development based on needs and geographic gaps
- Providing energy code training
- Working with contractors to build their capacity and help them attain licenses and certifications (e.g., BPI, ASHRAE)
- Developing a technical lab dedicated to showcasing a specific technology and training local community college students on the technology

Technical Approach to Plan Development

Our technical approach to developing the Workforce Development Plan begins with assessing the market. Examples of our outreach strategies include:

- Working with local community colleges to understand their enrollment trends and needs
- Engaging with stakeholders to understand their community needs and gaps
- Coordinating with existing workforce, education, and training programs in the state
- Partnering with equipment manufacturers to leverage their market analysis, technical training, and education resources

This analysis and coordination will inform our outreach and engagement plan strategy, feed into specific targets, and guide community-specific outreach and delivery strategies. It will also help us understand where we need to invest program resources to expand the pool of market partners and ensure they know program resources they can braid with their services to maximize customer value. Once developed, the plan will include the following three phases:



- Understanding of shared workforce challenges as it relates to energy-efficient or clean energy technology
- Establishes training materials and approaches we can customize and deploy in Nebraska
- Experience embedding workforce development initiatives into our design to support MT

Delivery Model Decision Making Plan

Duration: 90 Days

Because federal and U.S. DOE compliance is required for this program, Nebraska's most critical decision will be which delivery model to operationalize. This decision will guide all facets of our technical approach. The purpose of the Delivery Model Plan is to analyze and identify the delivery model that:

- Ensures federal and U.S. DOE compliance
- Mitigates risk of fraud
- Maximizes opportunities for Nebraska businesses
- Facilitates workforce development
- Achieves J40 goals

Experience with Delivery Model Decision-Making

Having designed and delivered over 750 energy rebate programs and compliantly administered \$40 billion in federal funding, the Egis Team provides industry-leading expertise in the three delivery models commonly utilized for energy rebate programs. Below is a comprehensive analysis of the most widely used models for energy rebate programs, along with the Egis Team's recommended approach.

Technical Approach to Plan Development

Point of Sale (POS)

The point-of-sale approach to delivering energy rebates provides participants with faster and easier access to program rebates. By providing the incentive at POS, products, like electrification measures, become more accessible to low- and moderate-income customers (Figure 1: Nebraska Point of Sale Map).

Our team's point-of-sale offerings vary and include:

1. Online/eCommerce - Limited Time Offers/Promotions
2. Online/eCommerce – Marketplace with delivery of participant-selected eligible items
3. Online/eCommerce - Limited Time Offers/Promotions
4. Online/eCommerce – Marketplace with delivery of participant-selected eligible items
5. Online/eCommerce – Online selection of pre-bundled kits of eligible items
6. Big Box - In Store
7. Big Box – Online

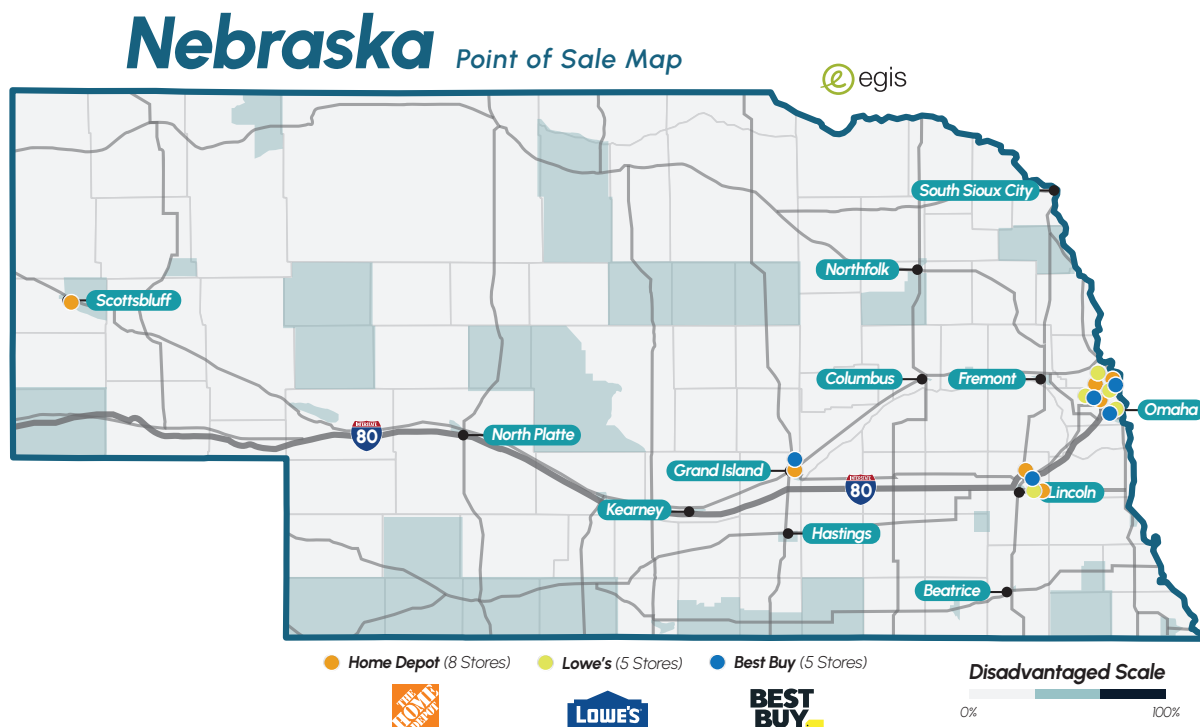


Figure 1: Nebraska Point of Sale Map

POINT OF SALE

STRENGTHS

- ✓ Perceived Ease
- ✓ Minimal agency impact
- ✓ Scalability

WEAKNESSES

- ✗ High retailer administrative burden
- ✗ Workforce development
- ✗ Inconsistent customer perception of 'rebate' based on various AMI factors
- ✗ Fraud, waste, and abuse
- ✗ Reporting
- ✗ State and local tax calculations
- ✗ Rural/J40 access
- ✗ Energy savings
- ✗ Expensive QC/QA

Open Contractor Network (OCN)

Like the POS model, the OCN model is a commonly used delivery model; however, it does not align with many U.S. DOE program requirements and exposes Nebraska to significant risks. With the OCN model, the NDEE and our team would manage a continuously unknown number of participating vendors and contracts. This makes facilitating workforce development, ensuring J40 requirements are met, and staff QC inspections difficult. It drastically increases the administrative burden for Nebraska. Additionally, the OCN model relies on the contractors to raise program awareness, making it difficult to standardize communication with the applicant population, leading to unpredictability in program production rates. Finally, and perhaps most importantly, the OCN model relies on contractors to educate and inform applicants of the benefits they are entitled to, as well as the utility bill ramifications. Due to the possibility of utility bill increases due to electrification measures within the home, we believe it is imperative that an agent of the state performs the benefit determination and explains the anticipated bill ramifications. Our approach reduces the state risk exposure related to bill increases post-program participation.

Open Contractor Network

STRENGTHS

- ✓ Applicant choice

WEAKNESSES

- ✗ Standardization
- ✗ Confusion
- ✗ Fraud
- ✗ Federal compliance and reporting
- ✗ Number of vendors and contracts the state would need to manage

Closed Contractor Network

Only one delivery model ensures compliance, reduces administrative expenses, and proactively mitigates program risks and challenges: the CCN Model. Our CCN model uniquely positions Nebraska to maximize these funds while lowering energy costs and consumption across the state. The only weakness in our model is that it limits the applicant's choice of a specific contractor. **The CCN model is the existing federal model that states utilize for CDBG housing programs and Disaster Recovery which rapidly deploys to impact thousands of homeowners in a short time period.** The NDEE can braid other federal and utility funds to maximize impact. Through this model, we can seamlessly integrate workforce development through Section 50123 and mitigate energy auditor scarcity issues. Additionally, the CCN model reduces administrative expenses and NDEE staff requirements while providing consistent workflows.

Closed Contractor Network

STRENGTHS

- ✓ Existing federal model
- ✓ Quality and capacity control
- ✓ Statewide standardization
- ✓ Reporting compliance
- ✓ Ensures bill neutrality or better
- ✓ Simplifies applicant experience
- ✓ Delivers synergies with CAAs and utilities
- ✓ Maximizes impact with blending, braiding and stacking funds
- ✓ Builds a qualified, certified and competent workforce

- ✓ Mitigates fraud, waste, and abuse
- ✓ Maximizes disadvantaged business enterprises and Nebraska-based contractors
- ✓ Maximizes number of households served
- ✓ Reduces administrative expenses and burden
- ✓ Multifaceted approach to exceeding J40 requirements
- ✓ Builds an Nebraska-branded program with NDEE-aligned controlled messaging
- ✓ Leverages the NDEE's existing partnerships

WEAKNESSES

- ✗ Applicant contractor choice



Risk Mitigation, Cost & Time Savings

- Ensures federal and J40 compliance and reduces the likelihood of fraud
- Contractors can buy in bulk and reduce supply chain risk costs
- Decreases agency/consultant staffing by minimizing invoice processing and payments
- Allows the agency to control applicant/project pull-through - shortening project life cycles.

Objective/Purpose of Plan

A thoughtful and comprehensive approach to energy rebate program design proactively identifies risks associated with project delivery and respective mitigation strategies to position the NDEE for programmatic success.

Experience in Risk Mitigation Planning

The Egis Team provides the NDEE with extensive experience in the design and implementation of federally funded energy rebate programs. Having compliantly delivered over \$40 billion in federally funded programs and over 750 energy rebate programs nationwide, our team provides unparalleled experience and best practices to address programmatic challenges proactively.

Technical Approach to Plan Development

Compliance & Reporting/AFWA/Buy America: The Egis Team provides Nebraska with exceptional expertise associated with federal compliance. We will work collaboratively with the NDEE to draft SOPs, appropriate controls, and other processes that comply with all federal programmatic requirements.

Contractor Scarcity: With nearly full employment in Nebraska and contractors busy with more profitable work than these programs provide, it is imperative to develop a multifaceted approach to ensure we engage a sufficient number of contractors, offer a predictable and consistent workflow, maximize opportunities for XBE participation, and geographically diversify this contractor base to ensure the program provides statewide reach.

Energy Auditor Scarcity: Nebraska will need hundreds of additional energy auditors to successfully deliver these energy rebate programs, and we must refrain from pulling energy auditors who are currently dedicated to delivering the U.S. DOE's Weatherization portfolio for Nebraska. The Egis Team has extensive experience training and certifying energy auditors to perform the work required in these rebate programs. We will take a multifaceted approach to ensure the appropriate capacity is developed and that this pool of resources is geographically and demographically diverse.

CAA Capacity: It is imperative to note that CAAs are integral to delivering the U.S. DOE Weatherization Program and are trusted community advocates throughout Nebraska. We will perform a capacity analysis of the CAAs to determine the most appropriate fashion to integrate them into delivery while not overburdening them.

Supply Chain: With all 50 states operationalizing programs concurrently, it is imperative that Nebraska design program benefits that mitigate supply chain risks. Our team will work with the NDEE to develop a comprehensive benefits package that mitigates this risk for participants.

Cost-Share Gap/Walk Away/Blending & Braiding: Proactive resolution of the cost-share gap significantly decreases the likelihood of applicant walk away. To solve this fundamental challenge, we have identified numerous funding sources that can be braided with the rebate allocations.

IT Solution: Our IT solution/system of record provides a comprehensive tool that has successfully supported hundreds of energy rebate programs. This system ensures compliance, decreases cost and time for system build-out, and provides the highest level of security for PII.

Justice 40: We provide a multifaceted approach to ensuring J40 compliance. Our plan maximizes investments in J40 communities, facilitates workforce development and job placement for J40 residents, and facilitates contracting opportunities for XBE businesses to play a vital role in delivering these energy rebate programs.

Timely Contractor Payments: Processing timely payments to contractors creates a positive environment that facilitates their ongoing participation in these initiatives. We will work with Nebraska to develop a payment processing SOP that considers agency capacity and establishes appropriate controls.

- Identifies risks beyond the typical program risks
- Early, proactive identification of risks saves time during design and development
- Mitigates and eliminates risks
- Provides for more efficient use of funds so less funds are wasted

Objective/Purpose of Plan

The Egis Team will coordinate and collaborate with Nebraska’s utility companies to maximize impact, streamline communication, leverage marketing resources, and identify high-performing contractors.

Experience with Utility Coordination

Our team is actively engaged in similar initiatives with hundreds of utilities nationwide. Similarly, we are currently administering a program in Illinois that seamlessly integrates federal, state, and utility funds into a single LMI-focused program. This knowledge and experience, coupled with our extensive research with Sections 50121 and 50122, uniquely positions us to accelerate this coordination and ensure a thoughtful and collaborative approach.

Technical Approach to Plan Development

We understand there is a diverse network of utilities (Table 12: Potential Utility Partners) across Nebraska. Each of these entities can play an integral role in this program’s design and implementation. During the preliminary stages of planning, our outreach and engagement will focus on the following:

- Developing a business process for customer data transfer
- Leveraging utility companies’ existing customer communication practices to enhance program awareness
- Gaining a broader understanding of currently operationalized rebate programs
- Coordinating program benefits to maximize impact on the population
- Exploring the possibility of leveraging utility dollars with the State’s formula allocations
- Identifying the existing contractor pool

Potential Utility Partners		
Electric Utilities	Public Power Districts	
• Black Hills Energy • Northern Natural Gas • NorthWestern Energy • Aquila (now part of Black Hills Energy)	• OPPD • LES • MUD • Loup Power District • Norris Public Power District • Cuming County Public Power District • Butler Public Power District • Southern Public Power District • Tri-State Generation and Transmission Association	• Howard Greeley Rural Public Power District • Perennial Public Power District • Dawson Public Power District • Twin Valleys Public Power District • Cornhusker Public Power District • Northwest Rural Public Power District • Panhandle Rural Electric Membership Association • Chimney Rock Public Power District • Niobrara Valley Electric Membership Corporation
Co-ops		
• Niobrara Valley Electric Membership Corporation		

Table 11: Potential Utility Partners

The Egis Advantage	 Risk Mitigation, Cost & Time Savings
	• Prevents duplication of benefits • Identifies high-performing contractors currently working for the utilities • Decreases the likelihood of applicant confusion with similar programs • Leverages utility marketing resources and program funds • Streamlines data transfer

Energy Star - Installation & Equipment Specification Guidelines Plan —

Duration: 90 Days

Objective/Purpose of Plan

The Egis Team's Quality Management Plan incorporates proactive strategies to ensure projects comply with program rules and are installed correctly the first time. This ultimately minimizes the number of touches the customer has with the program and leads to greater customer satisfaction while verifying installation quality on the back end to ensure claimed savings are realized. Through our participation in the U.S. DOE, ASHRAE, Air-Conditioning, Heating, and Refrigeration Institute, American Council for an Energy-Efficient Economy, and various regional working groups, we will monitor efficiency standards as they change over the lifetime of the programs. Almost 40 ENERGY STAR® product efficiency standards are scheduled for completion by late 2024 - through our work in other states, we also know what flexibility will be afforded in the near future. We understand that the U.S. DOE is working to update dozens of appliance energy efficiency standards, with many of the updates legally overdue and potentially impacting HOMES and HEAR equipment eligibility standards.

Experience with Installation & Equipment Specifications

The Egis Team takes a holistic approach to quality management that touches all aspects of the programs we deliver. As such, installation and equipment specifications are built into the Program Operations and Quality Management plans that govern our day-to-day program operations within the 440+ active energy programs we deliver today.

Technical Approach to Plan Development

Throughout our 20+ years of experience designing and successfully delivering federal, state, and utility programs across the country, we have adapted best practices and lessons learned from these programs to incorporate key proactive strategies into our QC/QA procedures to ensure projects are installed correctly the first time, such as:

Setting clear contractor expectations from the outset and reinforcing expectations through regular training. Initially, we will provide a program overview, outline participation requirements and expectations, and train them on installation expectations. We then reinforce the training during our regular interactions with contractors. We will also analyze contractor data and inspection results to identify contractors who may need additional training.

Conducting ride-alongs with participating contractors. We will accompany new contractors on a higher sampling of projects at the beginning of their program participation to validate that projects are performed correctly and equipment is installed per program guidelines/specifications. We will also offer feedback on improving service delivery and suggest adjustments to meet program standards.

Training and retraining. Over the lifetime of the programs, we will QC/QA installations on a random sampling to ensure standards are met and to comply with our EM&V protocols. We will routinely scan the market for new equipment and supply chain constraints and update quick reference guides and training materials.



Innovations, Cost Savings & Risk Mitigation

The Egis Advantage

- Establishes templates for Equipment Installation Guides and Quality Management Plans that can be customized for Nebraska
- Working partnerships with manufacturers across the country to provide technical specifications
- Best practice installation experiences we will share through materials and 1:1 training with participating contractors

Environmental Compliance & Waste Stream Management Plan —

Duration: 60 Days

Objective/Purpose of Plan

The Environmental Compliance and Waste Stream Management Plan will develop a business process and appropriate project controls to ensure that all environmentally sensitive material being removed from households is disposed of in a manner compliant with the Environmental Protection Agency and other federal and local guidelines.

Experience in Environmental Compliance & Waste Stream Management

The Egis Team has experience designing and delivering large-scale environmentally sensitive debris removal contracts. Our professionals have served in leadership roles for numerous state and governmental agencies to develop, implement, oversee, and report a compliant disposal strategy.

Technical Approach to Plan Development

Our comprehensive plan will mitigate programmatic risks and includes the following:

- Identification of environmentally sensitive materials or substances
- Compliant disposal locations across Nebraska
- Drafting integration of environmental compliance language into contractor contracts
- Development of SOPs and documentation requirements
- Development of reporting guidelines
- Adoption of QC/QA methods and reporting

The Egis Advantage	e Risk Mitigation, Cost & Time Savings	
	• Non-compliant disposal of environmentally sensitive materials poses significant risks to these programs and the NDEE • Develop a temporary debris reduction sites strategy to decrease administrative costs associated with reporting and compliance	

Health & Safety Plan —

Duration: 30 Days

Objective/Purpose of Plan

The Health and Safety Plan will develop programmatic standards and procedures to ensure all work is done by federal and state safety standards.

Experience with Health & Safety Planning

The Egis Team has developed, implemented, and monitored compliance with program-wide health and safety plans on billions of dollars of federally funded home repair programs, including, but not limited to:

- Various energy rebate programs
- CDBG-DR
- Over \$7 billion in other federally funded projects in recent years
- FEMA-STEP

Technical Approach to Plan Development

Our program-specific health and safety plan will include the following elements:

- Safety policy statement
- Details regarding the job sites' location and condition
- List of identified hazards
- List of responsible personnel
- Description of the project scope from a safety perspective
- Hazard control policies
- Safety and emergency contact information
- Incident reporting requirements
- Training protocols

The Egis Advantage



Risk Mitigation

- Mitigates likelihood of workplace injuries and "ensures workplace safety is the highest priority"

Procurement Guide Plan —

Duration: 90 Days

Objective/Purpose of Plan

This plan will assist Nebraska in developing a contractor engagement strategy and subsequent procurements.

Experience with Health & Safety Planning

Our team provides extensive experience in energy rebate contractor engagement strategies and federally compliant procurements. We have provided technical procurement assistance on billions of dollars in federally funded programs.

Technical Approach to Plan Development

We will work collaboratively with the NDEE to develop federally compliant procurements that ensure the state has qualified and competent contractors with the appropriate capacity and geographic reach necessary to execute this statewide initiative. Our approach will also facilitate a local workforce engagement plan, maximizing Nebraska-based business participation and affording numerous opportunities to XBEs to ensure J40 goals are achieved.

The Egis Advantage



Innovation, Risk Mitigation & Cost Savings

- Ensures 2 CFR and State of Nebraska procurement guidelines
- Maximizes opportunities for Nebraska-based contractors
- Facilitates participation for minority and small business entities
- Ensures qualified, competent contractors are performing all work
- Provides a streamlined approach in multi-year contractor engagement, thus decreasing labor associated with numerous procurements
- Streamlines the invoicing process and decreases invoice processing and payment costs

Objective/Purpose of Plan

A critical component to the perceived or actual success of Nebraska’s energy rebate programs will be grounded in a thoughtful and comprehensive approach to ensuring applicant satisfaction.

Experience with Customer Service Plans

The Egis Team has designed energy programs grounded in reducing energy consumption and spending and maximizing customer impact and satisfaction.

Technical Approach to Plan Development

Building on our best practices, there are nine essential components to a customer service plan for energy rebate initiatives. We will work collaboratively with the NDEE to draft a plan for adoption, including the following:

- Streamline and simplify the application process
- Establish a help desk and complaint hotline
- Afford flexible hours of operation
- Deliberately explain the financial impacts of installed benefits
- Provide manufacturer and contractor warranty assistance
- Perform QC and final inspections
- Establish quarterly process improvement exercises
- Design a program that allows applicants’ choice
- Pre-screen contractors to ensure competency and qualifications

The Egis
Advantage



Risk Mitigation

- Ensures a comprehensive program to maximize customer satisfaction

Maximizing Impact Across Nebraska

The Egis Team provides the State of Nebraska with extensive experience in analyzing the outcomes and financial implications of energy efficiency. We are currently working with multiple states on these IRA rebate programs to provide preliminary analyses on the impacts of key program design considerations. This analysis is grounded in estimating the number of households served, the number of jobs created anticipated energy savings, average utility bill reduction, and administrative costs associated with different delivery channels.

Our program design team will work collaboratively with NDEE staff and other program stakeholders to provide the necessary data points, key decisions, and their impacts to deliver a thoughtful, comprehensive, cost-effective, and transparent program for the State of Nebraska.

Forecasts of Energy Savings by Program

The Egis Team has analyzed a multitude of factors and has preliminarily assessed the impact of the Nebraska program in the following table. These are just some of the metrics that can be analyzed and will be further refined throughout the program design phase.



Tools & Additional Resources to Enhance Programs' Impacts in Nebraska

The Egis Team will work collaboratively with the NDEE to identify a myriad of funding streams (federal, state, local, philanthropic, utility) that can be braided and stacked with the IRA portfolio to enhance the benefits and impacts offered to Nebraska households.

As outlined in the previous section of this proposal, our professionals have reviewed the existing program landscape in Nebraska and identified multiple programs worthy of consideration for collaboration with these IRA rebate programs.

An Inter-Agency Coordination & Braiding Funds Plan for Streamlining Implementation and Maximizing Impact

The Egis Team provides industry-leading professionals well-versed in identifying synergistic programs and developing braiding strategies grounded in maximizing impact and compliance. As noted in previous sections of this response, we have proactively identified various state, Nebraska utilities, and local initiatives that are potential braiding opportunities to enhance impacts and mitigate programs' risks.

The NDEE must coordinate with other agencies in Nebraska to successfully deliver the home energy rebate programs. Four key goals can be accomplished through inter-agency coordination and braiding funding from other sources:

1. Develop a categorical eligibility plan to streamline the application process
2. Synergize workforce development funds to maximize job creation and upskilling/reskilling
3. Leverage other programmatic marketing strategies to maximize energy rebate program awareness
4. Close the cost-share gap to prevent applicant "walk away"

The HOMES (50121) and HEAR (50122) programs contain a cost-share gap that, if not closed, creates a significant barrier to program participation, especially within Nebraska's LMI population. This gap equates to a homeowner contribution of 20% on average of the total benefits afforded, thus requiring the homeowner to front thousands of dollars to receive the program's benefits. Nebraska can combine these rebate dollars with other federally funded, utility, philanthropic, and state programs to maximize the impact on a household-by-household basis. This decreases deferrals and administrative costs and maximizes the outcomes for Nebraska homeowners. Additionally, many applicant homes may have pre-existing conditions that preclude their eligibility in the program. These conditions could include leaky roofs, mold, etc., which may not be able to be addressed with program dollars; therefore, alternative funds must be identified to provide "preparedness" resources similar to the U.S. DOE Weatherization program approach.

The Egis Team will work collaboratively with the NDEE’s team to identify appropriate partner agencies and programs to integrate into the overall benefits package for Nebraska residents.

In addition to coordinating with other agencies across Nebraska to provide a more efficient and easy rebate process for applicants, our funding experts will work collaboratively with the NDEE’s team to identify funding sources that can be compliantly braided with the rebate dollars to close the cost-share gap, decrease the likelihood of applicant “walk away,” and maximize the impact of all funding sources within each household (Table 12: Critical Programmatic Challenges and Multiple Potential Funding Sources).

Critical Programmatic Challenges & Multiple Potential Funding Sources		
- HAF - U.S. DOE Weatherization funds - CDBG Formula funds	- Unencumbered Emergency Rental Assistance funds - Energy Efficiency Community - Block Grant funds	- Utility incentives - Philanthropic contributions - American Rescue Plan funds - IRA

Table 12: Critical Programmatic Challenges and Multiple Potential Funding Sources

This identification of braiding opportunities must also be coupled with a systematic approach to ensuring compliance with federal requirements for eligible expenditures and reporting. The Egis Team provides Nebraska with a comprehensive solution ensuring compliance and mitigating risk associated with duplication of benefits and potential federal clawback.

Coordinated Funding Streams

Complementing program rebates with other funding sources, like weatherization program funds, utility rebates, and financing, can break down cost barriers and make energy-efficient equipment purchases more affordable. We will leverage our national expertise to incorporate these other funding sources. New partnerships could also be identified to bring private and public funding sources into the energy efficiency market. The Egis Team can create partnerships with market actors to make financing more available and empower them with tools to help them assess the financial viability of projects. Where available, property-assessed clean energy financing could also be leveraged.

The Egis Advantage	e Innovation, Risk Mitigation & Cost Savings	
	• Leverages multiple funding sources to maximize household impact and benefits • Increases energy savings through a multifaceted solution • Maximizes participation amongst the most economically challenged populations • Enhances job creation through a holistic approach • Decreases administrative expenses and time related to eligibility determinations • Braiding of funds grounded in compliance • Reduces applicant acquisition costs and eliminate the cost-share gap to reduce applicant “walk away” • Maximizes impact while reducing administrative expenses	

Justice 40 Strategy and Monitoring

We would propose replicating strategies currently being deployed in multiple states, to best position the NDEE to maximize participation and impact within J40 communities throughout the State of Nebraska. Our strategy includes, but are not limited to:

- GIS mapping
 - Targeted marketing
 - Identification of key community leaders
- Partnerships with non-profits
 - CAA collaboration
 - Diverse contracting strategies

Pilot Projects to Test & Adapt Implementation

Pilot programs are our approach to collaborative implementation of the program and adjustments based on feedback and initial outcomes.

The Egis Team is currently working with numerous states to design various programs based on the unique needs and objectives of each program. We have developed pilot projects in the following categories:

- Single family
- Multi-family
- CAAs (50122 braided with WAP)
- PHAs
- Manufactured housing
- Emergency Replacement Program

Chosen and developed collaboratively with the NDEE and different stakeholders, pilot projects' initial outcomes will enable us to collect feedback, refine SOPs, evaluate contractors, assess program demands, etc., and make the necessary adjustments for a streamlined program delivery. Below is our technical approach to a selection of pilot programs mentioned above:

Single Family Program Pathway

Industry Leading Expertise in Single Family Program Delivery

The Egis Team has unparalleled experience delivering over 750 similar energy efficiency and rebate programs across the U.S., including the current IRA Rebate Programs in Indiana and Ohio. We operate these programs daily, serving over 1 million households nationwide while delivering over \$4 billion in energy rebates.

Achieving Programmatic Goals & Objectives

A thoughtful and comprehensive single-family program positions Nebraska to achieve numerous goals identified during the planning process. The Egis Single Family Solution can accomplish the following goals:

- Simple applicant experience
- Reduces energy consumption and utility bills
- Maximizes Nebraska contractor participation
- Ensures statewide reach
- Specifically targets J40 and LMI households

Simple Applicant Experience

Our solution and business processes have been tested through years of experience in similar rebate programs and provide a simple, easy-to-access, but compliant user experience. The NDEE must provide a straightforward experience to avoid applicant confusion and loss. Aside from our proficient process, we will also work with local community partners to ensure a successful participant journey. Our simplified applicant process is shown below.



Multi-family Program Pathway

Industry Leading Expertise in Multi-Family Pathways

The Egis Team has successfully designed and deployed energy efficiency and electrification programs in multi-family settings throughout the U.S. Our proven tactics, grounded in U.S. DOE compliance, simplify the tenant experience, best position Nebraska to achieve its multi-family quota and can facilitate early “program wins” for the NDEE on these energy rebate programs.

Achieving Programmatic Goals & Objectives

A thoughtfully constructed and early-launched multi-family pathway provides numerous benefits to the NDEE. We are currently collaborating with another state energy office, U.S. DOE, HUD, and a large public housing authority to develop a multi-family strategy focused on public housing units. This multi-pronged approach may serve as a national blueprint for state energy offices and can achieve numerous goals in Nebraska. Some of those goals are highlighted below:

- Over-the-shoulder training for auditors and contractors
- Streamlining SOPs
- Large quick wins for the NDEE
- Accomplishes J40 goals at the earliest possible date
- Facilitates U.S. DOE requirements that 10% of funds go to LMI multi-family units
- Refinement of workflows
- Raises statewide program awareness
- Fosters community trust
- Launches the program in a controlled environment

Potential PHA Projects

The Egis Team has proactively identified several low-income housing complexes that could be viable candidates for inclusion in the NDEE’s PHA Program.

Identification of Additional Multi-Family Properties

The Egis Team will work collaboratively with the NDEE and other key state and community stakeholders to identify additional multi-family properties throughout Nebraska that may be viable candidates for program inclusion. Some examples of viable housing communities are outlined below (Figure 2: Nebraska Public Housing Map):



Figure 2: Nebraska Public Housing Map

A THOUGHTFUL MANUFACTURED HOUSING PILOT PROGRAM

Overview

Approximately 10.6% of Nebraska’s housing consists of manufactured housing.

Benefits to a Manufactured Homes Pilot and Program Pathway

Manufactured homes typically have a higher energy cost, up to 30% higher than similarly sized “stick-built” homes, and are hence subject to high energy bills.

Extensive Experience with Manufactured Housing Efficiency and Electrification Projects

The Egis team provides extensive experience in weatherizing manufactured homes and understands that many of the most impactful measures (e.g., belly insulation, etc.) are unique to this type of housing stock. Our SMEs and manufactured homes specialists can work collaboratively to design and implement a manufactured housing pilot that can serve as a program pathway for a broader program rollout.

CAP Pathway – Weatherization in Conjunction with Rebates

The U.S. DOE has encouraged states to consider braiding the IRA Rebate Programs with the pre-existing U.S. DOE weatherization Initiative.

Industry Leading Expertise in the CAP Pathway

The Egis Team provides extensive experience working collaboratively with CAAs to synergize weatherization funds with energy rebate dollars. We are currently working with numerous CAAs across the country. Our Illinois work (Figure 3; Impact of Illinois Residential Program and Figure 4: Projects Completed), which includes work with more than 40 CAAs, may serve as a model to be replicated in Nebraska. The Illinois model braids federal utility and other funding sources, grounded in CAP delivery, and has served more than 24,000 households in just the first year of the program.

Further, through our work with the state of Florida, we are part of a U.S. DOE-sponsored working group designing a pilot program that braids 50122 with WAP benefits. This pilot project is expected is expected to launch in January 2025, and if the desired outcome is achieved, the state of Florida intends to launch this program statewide.

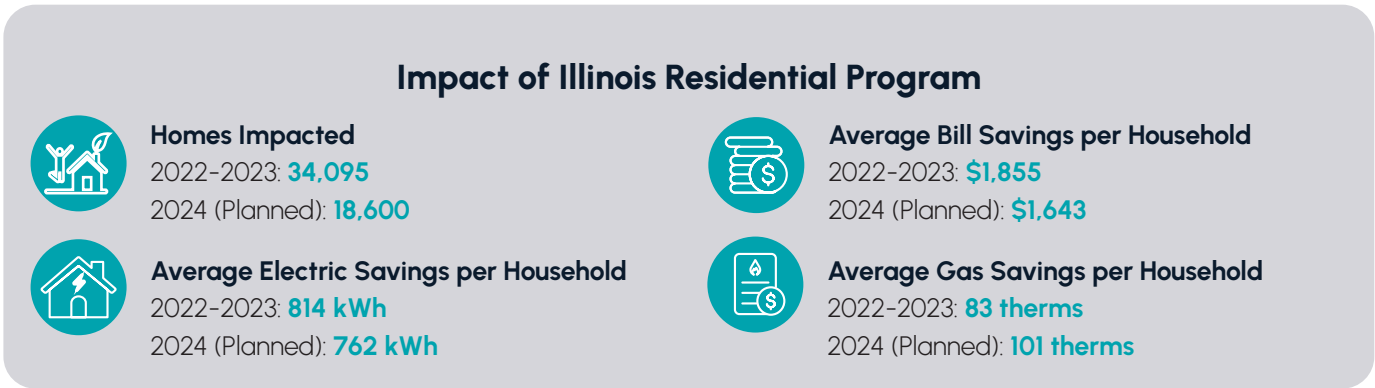


Figure 3: Impact of Illinois Residential Program



Figure 4: Projects Completed

Multiple Approaches to Maximize Impact

There are two ways in which rebate funds can be paired with WAP resources.

1. Rebate dollars braided with WAP and delivered through CAAs
2. Rebate dollars are deployed upon completion of weatherization activities at an eligible household

Engaging These Partners During the Planning Process

Our extensive knowledge and track record working with CAAs uniquely position us to understand the strengths and weatherization of this braiding strategy. We encourage the NDEE to perform a capacity analysis of each of the CAAs to determine their ability to integrate these funds into their existing portfolio in a manner compliant with U.S. DOE guidelines and on a schedule aligned with the NDEE's goals and objectives for the IRA Rebate Programs. We can work collaboratively with the NDEE to develop a questionnaire that can be distributed to each of these partners to help facilitate a program design that mitigates risk while building upon the strong relationships these agencies have in the communities that they serve.

Grant Awards & Compliance Monitoring with CAAs

Should the NDEE decide to award IRA grants to CAAs, the Egis Team can work with the NDEE to develop the appropriate programmatic and financial controls to ensure a streamlined approach to U.S. DOE compliance and reporting.

Tribal Pathway

National & Nebraskan Experience with Tribal Populations

The Egis Team knows that tribal communities throughout the U.S. have high energy burdens, an inherent distrust of government programs, and often are economically disadvantaged. We provide exceptional experience delivering energy efficiency and electrification to tribal communities throughout the U.S. Still, more importantly, we offer unmatched deep-rooted relationships with tribal leadership, its members, and stakeholder groups throughout Nebraska.

Opportunities for Collaboration

In addition to the state's formula allocation from the U.S. DOE, numerous tribal communities also received IRA Rebate Program allocations. Therefore, multiple programs may operate concurrently within the State of Nebraska, and program alignment or coordination will be essential. There are additional ways in which the state needs to and can collaborate with tribal communities. This should begin early in the planning process to identify parallel programs, mitigate the likelihood of duplication of benefits or fraud, identify anticipated unmet needs, foster trust and awareness, and facilitate workforce development and career certification opportunities.

Tribal Allocations

- **Omaha Tribe of Nebraska:**
\$456,957
- **Ponca Tribe of Nebraska:**
\$635,984
- **Santee Sioux Nation:**
\$310,435
- **Winnebago Tribe of Nebraska:**
\$429,208

A Pathway-Specific Compliance Plan That Mitigates Fraud, Waste & Abuse

The Egis Team combines industry-leading expertise in designing compliant federally funded programs with exceptional experience in each program pathway detailed above. This unique combination of experience positions us to proactively identify programmatic and pathway-specific risks, which will be appropriately mitigated during program design and monitored throughout execution.

Embedding anti-fraud, waste, and abuse (AFWA) policies, processes, and procedures is critical at the onset and throughout the duration of a program. A proactive approach, rather than reactive, focuses on assessing risk, implementing preventive and detective controls, establishing continuous monitoring to evaluate controls, and leveraging technology to actively prevent and fight fraud.

Preventing, Detecting & Responding to Fraud

Recognizing that there is no "silver bullet" when combating fraud, the government agency responsible for oversight should tailor its approach based on fraud exposure, risk tolerance, resources, and program objectives. A robust, layered approach to combating fraud provides a strategic method for assessing and managing fraud risks, focusing on continually improving fraud risk management by implementing preventive and detective anti-fraud controls.

Approach

AFWA controls should be embedded into policies and processes, and the overall fraud risk management processes should align with program objectives. As fraud is identified, the program should respond to each instance in a repeatable and scalable manner.

Policy & Procedure Development

An effective AFWA program depends on setting policy at the program's front end and designing and implementing systems, processes, and reporting to align with policy. Creating policies that set the tone within the program, including anti-fraud and conflict-of-interest policies, aid in fraud prevention and reiterate the program's commitment to legal and ethical standards. Pending the necessary approval, the anti-fraud policy and procedures may consist of the following:

- Define fraud, waste, and abuse within the program
- Establish investigation responsibilities and reporting protocols
- Identify the overall responsibility for the management of fraud
- Encourage employees to report suspicion of fraud

File Review, Reporting & Document Management

Ensuring appropriate documentation is maintained to support investigations and other reporting needs is critical to the success of the investigation and the potential recovery of assets. Applications, statements, and related documents may be reviewed as part of the investigations and reporting processes. Upon receipt, all documentation is immediately scanned and entered into document management systems. As defined in established policies and procedures, reporting and document management considers factors such as time sensitivity, notification procedures, confidentiality, and securing of evidence.

Responding to Internal & External Audit Requests

A key element of our approach includes designing and developing effective internal controls to prevent and detect fraud, waste, and abuse and enable compliance with applicable guidelines. As needed and in collaboration with the appropriate governmental agencies, the AFWA team can participate in internal and external audits from federal, state, and legislative entities.

Evaluation, Measurements & Verification Throughout the Programs' Life Cycle

The Egis Team provides industry-leading expertise in the evaluation of the energy efficiency and rebate programs.

We will work with the NDEE to develop a strategy and KPIs to be closely monitored and serve as the foundational measurement tools to guide program evaluation. Outlined below is a table of preliminary KPIs that can be expanded upon to provide a comprehensive analysis of program impacts:

- Total allocation and funds distributed
- Resource tracking related to braided funding sources
- Performance monitoring of paid media spend
- Application KPIs (total number, percentage by categorical eligibility, geographic breakdown, J40 communities, processing time, and percentage accepted/denied)
- Funds distributed by pathway (single family, multi-family, and CAA)
- Total funds invested by benefit (heat pump, water heater, appliance, etc.)
- Energy saved
- Timeline tracking for audit scheduling to completion
- Contractor performance metrics (total households served, contract funds remaining, punch list completion, average time for task order completion, etc.)
- Call Center metrics (call volume, answering time, FAQs)
- Workforce Development and job creation metrics (by trade, discipline, etc.)
- J40 tracking (percentage of funds invested, jobs created, and contracts awarded)
- Average utility bill savings

The Egis Team – An Adaptable and Collaborative Partner for Nebraska

In addition to changing U.S. DOE guidance throughout the programs' life cycle, we will closely monitor a variety of KPIs related to each program pathway included in the Nebraska program offerings. **We can adjust business processes, allocate funding to each pathway, and share national best practices and lessons learned to continually enhance and improve the program's performance and impact from inception to completion.**

Reporting & Status Updates

The Egis Team provides the NDEE with a thoughtful, time-tested, and efficient solution for communication, reporting, and program status monitoring. Our approach can be divided into two categories:

- Development and adherence to the program's Communication Plan
- Development of KPIs and implementation of reporting dashboard (Figure 5: Dashboards)

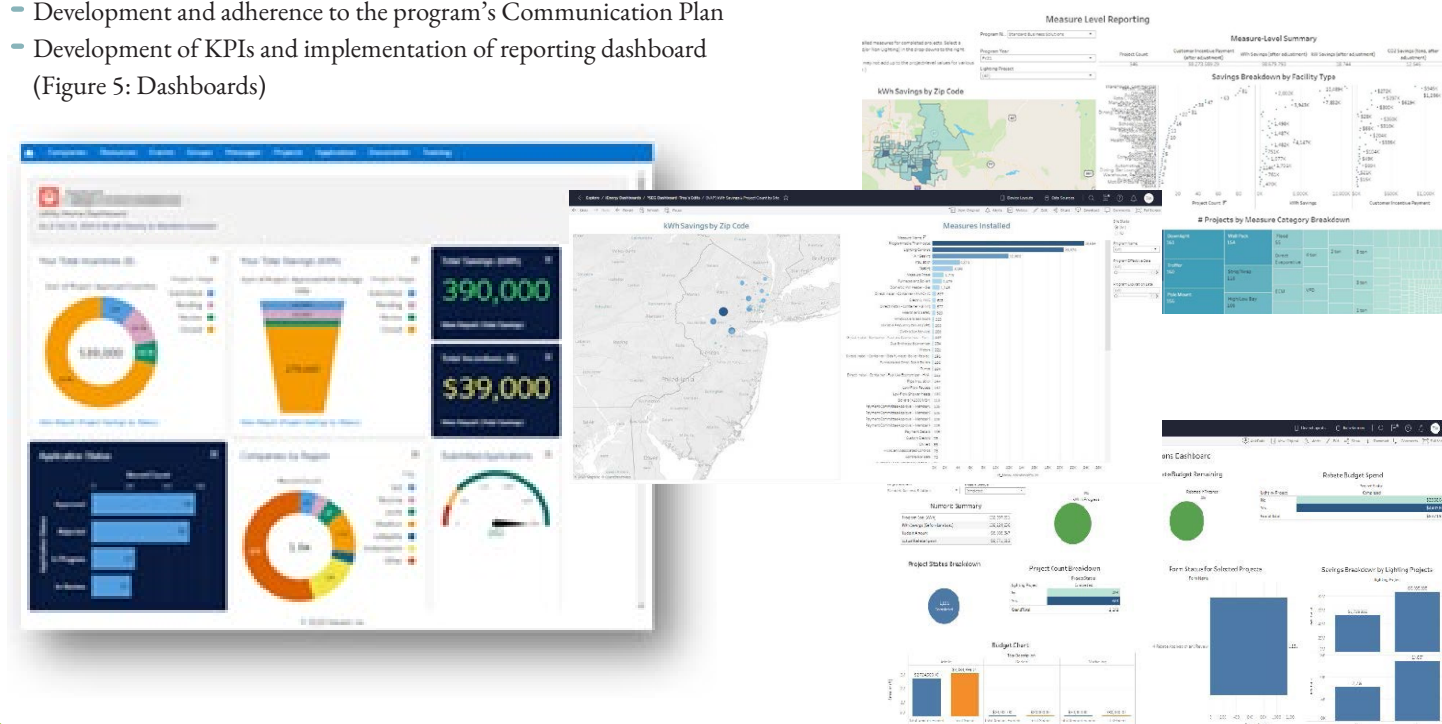


Figure 5: Dashboards

A Thoughtful Communications Plan for the NDEE

As part of the project kick-off meeting, we will develop stakeholder lists, along with the following deliverables to ensure efficient and effective communication is maintained throughout the program. For the meetings outlined below, we will provide meeting summaries and track action items and deadlines in the master program scheduling software.

- Frequency and cadence of program executive staff meetings
- Frequency and cadence of compliance team
- Frequency and cadence of multi-agency stakeholder team

Efficient & Effective Program Monitoring & KPI Tracking

The Egis Team understands that in addition to the DOE reporting requirements, there will be a multitude of additional data points and KPIs that need to be effectively tracked, monitored, and reported throughout the program. Our iEnergy platform includes a client-facing dashboard, which can be customized at program launch and easily modified to provide a simple, efficient methodology for NDEE staff or other state interested parties to review. Based upon our extensive experience with federally funded and energy rebate programs, we have identified a number of KPIs that may be of interest to the NDEE. They include but are not limited to the following:

- Total allocation and funds distributed
- Resources tracking related to braided funding sources
- Performance monitoring of paid media spend
- Application KPIs (total number, percentage by categorical eligibility, geographic breakdown, J40 communities, processing time, and percentage accepted/denied)
- Funds distributed by pathway (single family, multi-family, and CAA)
- Total funds invested by benefit (heat pump, water heater, appliance, etc.)
- Energy saved
- Timeline tracking for audit scheduling to completion
- Contractor performance metrics (total households served, contract funds remaining, punch list completion, average time for task order completion, etc.)
- Call center metrics (call volume, answering time, FAQs)
- Workforce development and job creation metrics (by trade, discipline, etc.)
- J40 tracking (percentage of funds invested, jobs created, and contracts awarded)
- Average utility bill savings

A Commitment to Continuous Improvement

The Egis Team will implement procedures to facilitate continuous programmatic improvement throughout the program. Outlined below are the facets of our business process and how we monitor each to drive improvement:



MARKETING

Test & monitor ad spend for effectiveness, J40 engagement, ad clicks, clicks to apply, conversion rate & cost



CALL CENTER

Track gross call volume, average hold times & call times, answered vs. abandoned calls & call reasons throughout the program



CASE MANAGEMENT

Metrics will include number of applications reviewed, accuracy of eligibility determinations & caseload balancing



ENERGY AUDITORS

Review customer service feedback & inspection reports, share lessons learned & best practices



CONTRACTORS

Process improvement via mandatory meetings. Metrics will include completed installations, current number of open task orders & aging of task orders, inspection pass/fail rates & customer feedback



FINANCIAL CONTROLS

Number of contractor invoices per payment cycle, amount reimbursed per contractor, aging of invoices submitted vs. paid & amount paid per household



CUSTOMER FEEDBACK SURVEYS

Analyze & summarize customer feedback surveys' findings to attain our standard 97% customer satisfaction rate

iEnergy – A Simple “One-Stop-Shop” & End-to-End IT Interface to Answer to Data & Tools Requirements

The Egis Team provides the NDEE with a battle-tested and U.S. DOE-compliant system of record that has been successfully utilized on hundreds of energy rebate programs across the U.S. **Most importantly, this platform is already customized to align with the requirements of these IRA Energy Rebate Programs.** Additionally, our tool can do the following:

- Seamlessly integrates with PNNL/DOE, utilities, CAAs, and state and federal partners
- Manages every step in the applicant journey
- Provides an audit-compliant data repository for all activities throughout the program lifecycle
- Provides an applicant portal
- Case management
- Accommodate both Modeled and Measured Savings Programs
- Eligibility functionality
- An energy audit tool
- A portal for contractor communication and invoice submission
- Performance/KPI monitoring
- Comprehensive functionality to facilitate streamlined U.S. DOE reporting requirements
- Integrates BPI 2400 standards

Created specifically for Energy Rebates Programs by our team, our IT solution is able to collect, monitor, and alert for both programs distinctively, as well as for both measured, modeled, and the combination of both energy savings models for 50121.

Applicant Experience Application Portal

Our online applicant portal and the NDEE landing page (Figure 6: Applicant Portal and Landing Page) are designed to facilitate a seamless applicant experience, address FAQs, and connect applicants with contractors, CAAs, EERs, and retailers that support the programs. Our applicant portal seamlessly connects with each subsequent step in the business process to provide a streamlined solution for Nebraska and its citizens. Our team will support the maintenance of the program website through this proposed platform throughout the life of the program. For example, below is a screenshot of the Indiana Rebate Portal.

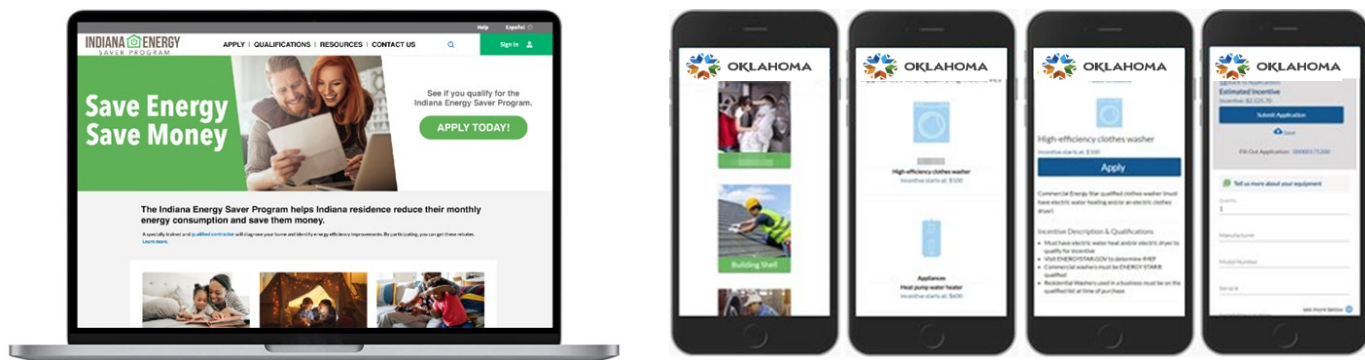


Figure 6: Applicant Portal and Landing Page

Applicant Income Verification Recommendations

The Egis Team has extensive experience with income verification, having designed and implemented multiple income-qualified programs across the states, as well as a U.S. DOE-approved approach for income verification eligibility for multiple states' IRA rebate programs.

The Egis Team will coordinate with the NDEE to develop an income verification process for applicants that meets the requirements set forth by the U.S. DOE for both the 50121 and 50122 HEAR Programs. This will involve requesting applicants submit documents via the iEnergy platform, such as recent pay stubs, tax returns, or proof of eligibility for approved government assistance programs that meet income thresholds.

Our team will review these documents to verify compliance with income eligibility requirements and confirm the compliant distribution of rebates to qualified recipients. The team also assists in policy development regarding eligibility issues and exceptions and incorporates any changes in U.S. DOE program guidance.

Additionally, to expedite and simplify the income verification process, the Egis Team will coordinate with the appropriate Nebraska state agencies managing approved government assistance programs allowed under categorical eligibility. Below is a list of federal and state assistance programs Egis will utilize to facilitate participant identification and eligibility verification:

- Rental help
- Home WAP
- Home Energy Assistance Target
- Case management and housing program
- Housing Improvement Program
- Housing opportunities for persons with AIDS
- Medicaid
- Children's Health Insurance Program
- Nutrition and Emergency Food Program
- Head Start
- Supplemental Security Income
- TANF
- Women, Infants & Children

Conduct Customer Satisfaction Surveys

As part of a One-Stop-Shop IT interface, iEnergy (Figure 7: iEnergy) provides a built-in Customer Satisfaction Survey application once work is done or a new appliance is installed.

Each order for either Home Energy Rebate program will be subject to a Satisfaction Survey. Once aggregated, the survey data will serve as KPIs to monitor contractors and program progress.

Energy Audit

Purpose: As the program's initial point of contact for field activities, our energy auditors will have BPI-2400 compliance, customer service, and conflict resolution training. We are committed to fostering goodwill with applicants throughout all program phases and believe its energy auditors are integral to this goal.

Monitoring: Senior leaders will conduct over-the-shoulder reviews for all energy auditors. Our team will incorporate applicant feedback from customer satisfaction surveys into recurring energy auditor training. Our software platform helps track the accuracy of assessments on an auditor-by-auditor basis, possesses guidance on auditing requirements, ensures audits adhere to program guidelines, and eliminates the risk of errors in the field data collection.

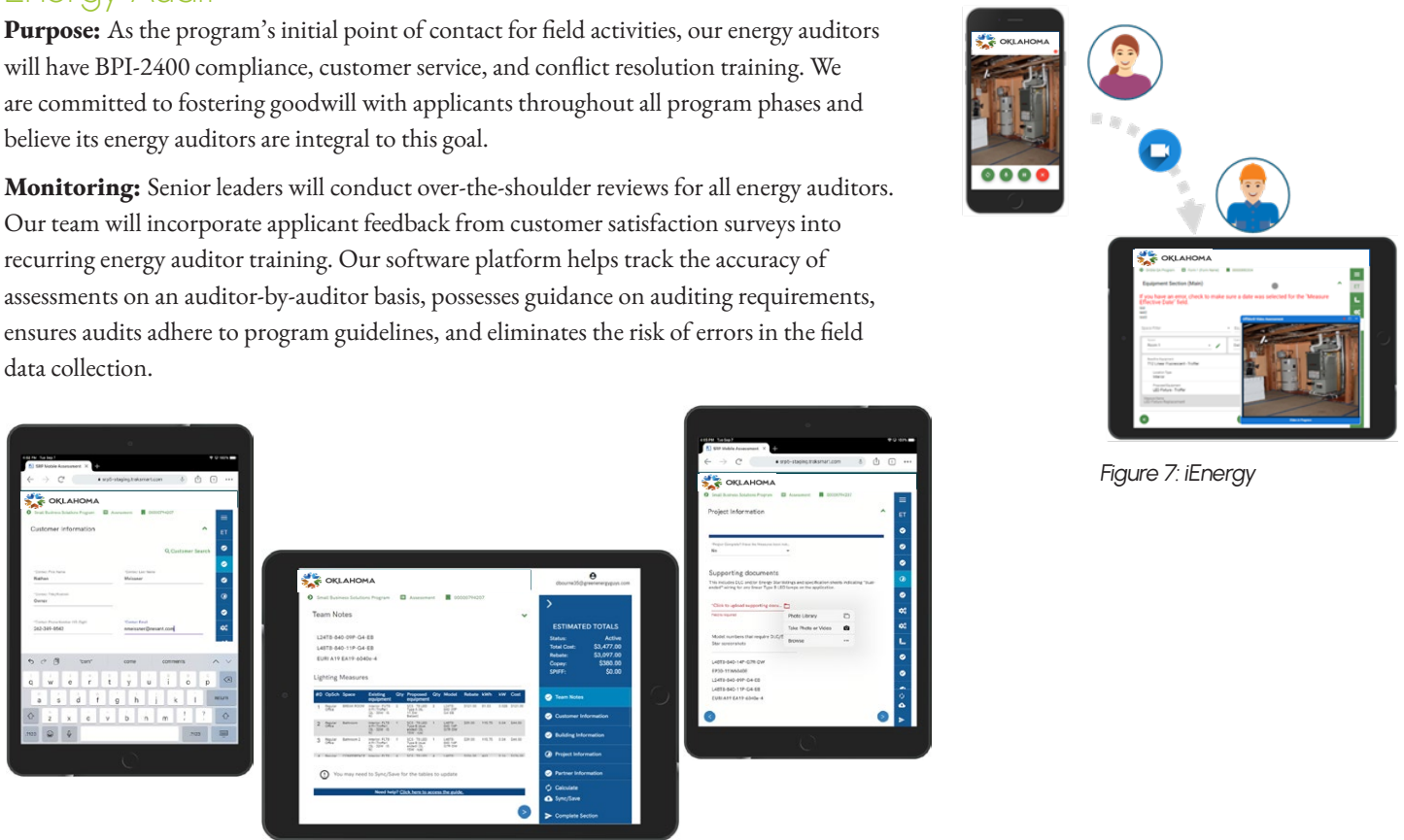


Figure 7: iEnergy

Program Controls & Compliance

Purpose: The Egis Team has provided case management services for over \$8 billion in federally funded home improvement programs and over 750 utility-backed rebate programs. Our time-tested production management and quality assurance methods remove barriers to participation, ensure efficient processing of program applications, assist in program spending forecasting, maintain compliance with state and federal requirements, and monitor/mitigate cases of fraud, waste, and abuse.

Staffing Plan: Six-to-one production vs. management team members. The Egis Team will monitor the applicant pipeline and expand and contract the case management team to contain cost where possible, yet quickly process applications as additional citizens request assistance. To drive productivity, promptly resolve issues, and increase the accuracy of eligibility determinations, case managers will be grouped in pods of six with one full-time pod leader.

Training: Training for our case managers is grounded in creating the most pleasant and seamless applicant experience. One way we achieve this is by streamlining the application process and minimizing the paperwork required by an applicant. These programs afford Nebraska the ability to use categorical eligibility. Therefore, we have proactively identified several programs that could be utilized. These include SNAP, TANF, HUD, CDBG, FEMA Individual Assistance and/or Public Assistance, and others.

Continuous Improvement: Our team will work to continuously improve the applicant experience through refinement of its SOPs and production monitoring (Figure 8: Production Dashboards). In addition to our supervisory oversight, we also receive and implement suggestions for improvement through our customer satisfaction survey.

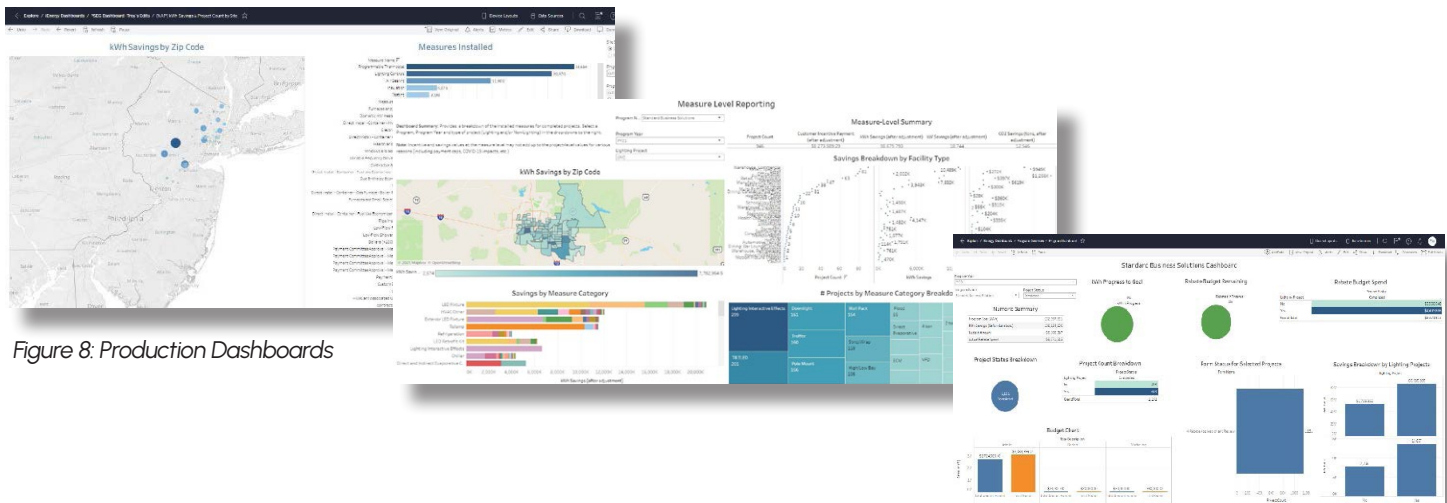


Figure 8: Production Dashboards

Transparent U.S. DOE Reporting & Compliance

Our IT system and data collection practices provide for ad hoc and customized report generation for program stakeholders. As noted in prior sections of the proposal, our project leadership team will meet with the NDEE leadership routinely to analyze the program production, any process improvement or modification areas, and key milestones achieved. A sampling of the data points measured and reported is included below:

- Contractor capacity
- J40 goals/progress
- Number of certified contractors
- Applicant volume
- Estimated and measured energy savings
- Geographic reach of the program
- Contractor key performance indicators
- Funds distributed/remaining
- Change orders
- Benefits duplication prevention

Integrate with Other Utility, State, or Non-Duplicating Federal Benefit Programs to Braid Rebate Streams

Through the creation of the state compliance roadmap, our team will identify stacking and braiding opportunities for the state.

Our system is currently being used in multiple states to successfully stack and braid utility, private dollars, and federal funds with cross-IT platform integration.

Monitor/Mitigate for Cases of Fraud, Waste & Abuse

Our comprehensive end-to-end IT system captures all program data in one place to ensure ease of monitoring, centralized control, and division of duties. Our compliance team will conduct regular status checks and audits of processes carried out within our IT system to fully avoid instances of fraud, waste, and abuse.

Ensure Energy Star (where applicable) & Other Equipment is Installed Correctly & to Specification

Through thoughtful program design, we will ensure Energy Star and other equipment are installed with the program's guidelines and goals. These designs include a contractor submittal process, a field and desktop verification process, and a process to certify new products within Energy Star guidelines. Our field verification method includes photo documentation of installed measures and our retained within iEnergy. Egis typically performs onsite inspections on a random or pre-defined sample of projects. In addition to verifying project quality, we also use

inspections to provide an added layer of customer service to participants and reinforce our client's position as an advisor to the participant. Inspectors are there on behalf of the program sponsor to make sure the job was done right and that participants can be sure they will see expected energy savings from their projects.

During onsite inspections, we verify program compliance and evaluate work quality to ensure claimed savings are realized. We confirm that equipment is installed and functioning, check that measure quantities match the application, and verify measures meet the specifications required by the solution or offering.

We design inspection protocols to limit regulatory risk, improve the participant experience, streamline delivery processes, enforce controls, and reduce costs. Our inspection philosophy, particularly for residential customers, is to validate and not impose. As such, we select inspection methods that can validate without site visits over methods that impose on a customer's time and property. For example:

- Enabling vendors to include photo documentation of equipment during installation rather than an inspector requesting to visit and impose on the customer another time
- Conducting phone/virtual inspections instead of in-person inspections
- Designing solutions and measures that eliminate the need for inspections

Contractor Portal Training & Monitoring

The iEnergy platform will provide the primary "hub" for contractors and aggregators to access support resources. Key capabilities and tools they will access here include:

- Participation requirements and guides
- Installation and product guides
- FAQs
- Training tools
- Measurement and modeling tools
- Marketing and branding collateral
- Aggregator/contractor performance tracking and quality measurements
- Installation incentive status and payment tracking
- Inquiry management

Purpose: We provide the state with turnkey management of installation contractors through risk mitigation strategies, workload balancing tactics, QC/QA protocols, invoice processing, and conflict resolution measures.

Staffing Plan: We provide dedicated workflow managers for each contractor, change order processing teams, and field oversight representatives to ensure projects are completed on time, meet program goals, and meet all rebate eligibility criteria.

Training: Our contractor management strategy is founded on program goals such as transparency, production monitoring, inspection outcomes, and areas needing improvement. This consists of regular progress reports for each contractor, recurring production meetings, and controls to ensure Buy America Act compliance for all installed products.

Monitoring: We will monitor installation contractors in gross monthly performance, customer satisfaction, aging on assigned task orders, average time to complete installations, pass/failure rates of QC/QA inspections, and overall contract drawdown.

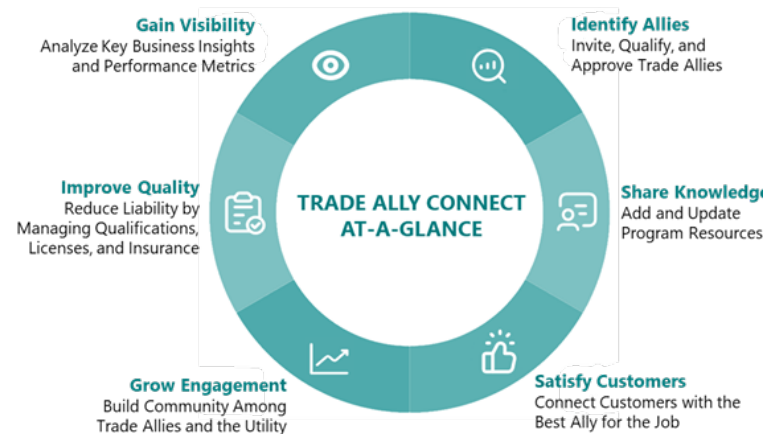
Focus on Trade Ally Connect

Trade Ally Connect (TAC) connects program administrators, contractors, and distributors with customers to promote NDEE programs. Built on the Salesforce platform, it enables the NDEE to build, engage, and manage a robust contractor network.

With seamless integration with iEnergy Program Management, contractors can easily find key information and submit projects.

It is a streamlined portal through which the NDEE can grow and maintain qualified contractors.

Contractors can apply for membership in the NDEE's Contractor Network. Once enrolled, they will have access to tools and training resources and be able to maintain key information like licenses and certifications. Contractors managed in TAC are automatically synchronized across the iEnergy platform for consistent access to



key tools such as the PUX and OnSite as well as making up-to-date contractor information available to customers. Project details can be synced from iEnergy into TAC to allow network managers the ability to see the performance of the network and individual contractors.

In addition to facilitating communication between the NDEE and contractors, TAC can also provide resources to help contractors upsell services by leveraging customer insights from program eligibility and previous engagements. TAC also optimizes the NDEE operations by providing information on upcoming customer programs, budgets, and certification requirements.

Notification System for Contractors

Through their TAC online portal (Figure 9: Contractor Portal), contractors can view announcements, receive email notifications, and track the status of their rebates processed through iEnergy. In addition, contractors will have direct access using single sign-on functionality to the PUX and iEnergy to submit rebate applications and view project statuses.

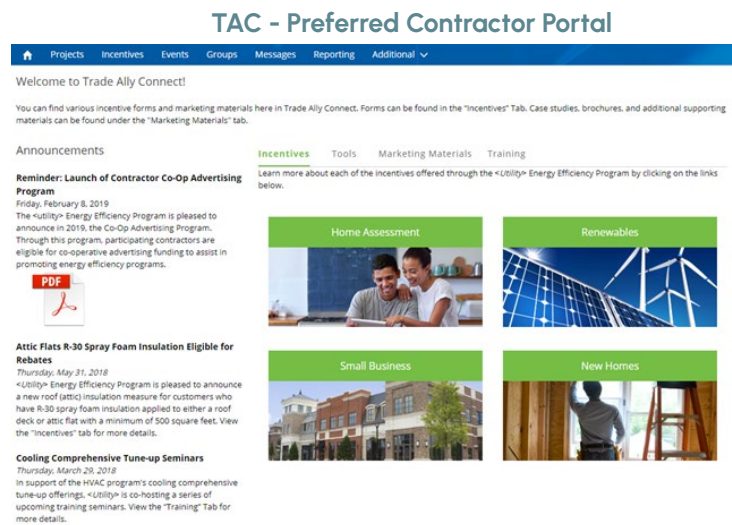


Figure 9: Contractor Portal

Contractor Network Tools

TAC provides the tools to establish, manage, and maintain the Contractor Network. See the image to the right for an example. TAC facilitates communication about performance between contractors and NDEE administrators with tools such as dashboards and reporting to provide insights on the health of the Contractor Network on how specific contractors are performing. The NDEE will be able to track annual and year-over-year metrics, such as the number of projects and energy savings by individual Preferred Contractor or the network as a whole.

Resource for Contractors

In addition to enrollments and tracking the performance of the Contractor Network, the Implementor will have the ability to manage both online and in-person events with TAC. Preferred Contractors can view events and enroll online while we can manage a number of enrollees, email notifications, content, and calendar invites.

TAC also features a Learning Management System (LMS). The LMS allows us to assign trainings to Preferred Contractors. The assigned user can view the assigned trainings, including YouTube or Vimeo video embedded directly into TAC, and answer several questions after to complete the training. Additional documents such as PowerPoint presentations, PDF fact sheets, or other applicable training documents can be attached to a training for the Preferred Contractors' reference or to help them complete the training.

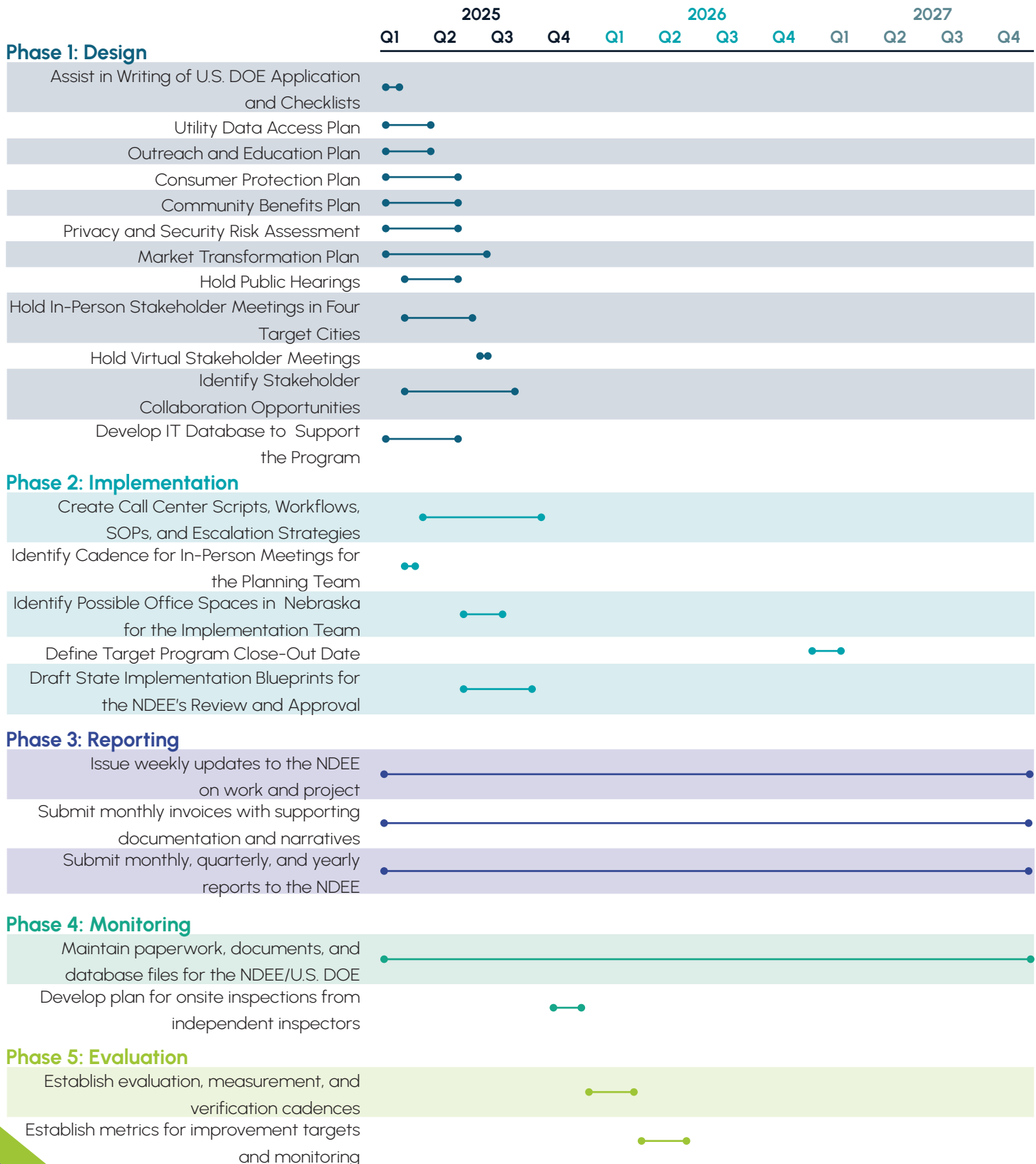
Homeowner

A Secure Solution That All Program Stakeholders Can Trust

Our technology platform, specifically designed for energy rebate programs, provides the State of Nebraska, along with all program partners, utilities, and participants with a proven, safe, and secure technology platform. We have already achieved SOC2 Type II compliance and will undergo an annual audit to maintain our security tools and processes.

DELIVERABLES & DUE DATES

TIMELINE FOR THE DEVELOPMENT & DELIVERY OF NEBRASKA'S HOME ENERGY REBATE PROGRAMS



CONTRACTUAL AGREEMENT FORM**BIDDER MUST COMPLETE THE FOLLOWING**

By signing this Contractual Agreement Form, the bidder guarantees compliance with the provisions stated in this solicitation and agrees to the terms and conditions unless otherwise indicated in writing and certifies that bidder is not owned by the Chinese Communist Party.

Per Nebraska's Transparency in Government Procurement Act, Neb. Rev Stat § 73-603, DAS is required to collect statistical information regarding the number of contracts awarded to Nebraska Vendors. This information is for statistical purposes only and will not be considered for contract award purposes.

____ NEBRASKA VENDOR AFFIDAVIT: Bidder hereby attests that bidder is a Nebraska Vendor. "Nebraska Vendor" shall mean any bidder who has maintained a bona fide place of business and at least one employee within this state for at least the six (6) months immediately preceding the posting date of this Solicitation. All vendors who are not a Nebraska Vendor are considered Foreign Vendors under Neb. Rev Stat § 73-603 (c).

____ I hereby certify that I am a Resident disabled veteran or business located in a designated enterprise zone in accordance with Neb. Rev. Stat. § 73-107 and wish to have preference, if applicable, considered in the award of this contract.

____ I hereby certify that I am a blind person licensed by the Commission for the Blind & Visually Impaired in accordance with Neb. Rev. Stat. § 71-8611 and wish to have preference considered in the award of this contract.

THIS FORM MUST BE SIGNED MANUALLY IN INK OR BY DOCUSIGN

COMPANY:	Egis BLN Consulting USA, LLC
ADDRESS:	8320 Craig Street, Indianapolis, IN 46250
PHONE:	317.806.2400
EMAIL:	tom.longest@egis-group.com
BIDDER NAME & TITLE:	Thomas C. Longest, CEO
SIGNATURE:	DocuSigned by: <i>Thomas C. Longest</i> E7AEE91E2E8D42D...
DATE:	1/16/2025

**VENDOR COMMUNICATION WITH THE STATE CONTACT INFORMATION
(IF DIFFERENT FROM ABOVE)**

NAME:	Karlei Metcalf
TITLE:	Head of Tender Unit
PHONE:	812.528.1250
EMAIL:	karlei.metcalf@egis-group.com

Attachment A

Technical Requirements

Marketing Research and Analysis

Request for Proposal Number 120003 O5

Bidder Name: Egis BLN Consulting USA, LLC

Bidder should fully respond to each question in enough detail to allow for comprehensive evaluation of the response. Responses will be considered in evaluating Technical Requirements.

Please organize information in the way it is requested to aid in efficient and fair evaluation. Please note as frequently and clearly as possible how proposal elements further the overall program objectives listed above. A completed copy of this form must be submitted with the proposal response.

TECHNICAL REQUIREMENTS	
PART I. PROGRAM DESIGN –	
a. PROGRAM DESIGN AND STAKEHOLDERS	
1	Bidders should describe their proposed approach to: Conducting background research and collecting data to inform program design, including the subtasks noted in Part I #1 of Requested Tasks. The bidder should generally describe their approach to conducting literature reviews, policy analysis, and/or comparative research. Bidders should describe their experience understanding and meeting state and federal program data requirements, how they have used program data, and any lessons they have learned related to ensuring program data is accurate and useable. Response: Overview of Other State IRA Rebate Programs The Egis Team is currently providing program design and implementation services for the following states: Indiana, Ohio, Arizona, Pennsylvania, Florida, and South Carolina. Our program design team will share key considerations related to ensuring statewide reach, proactive identification of contractor and auditor scarcity, risk assessment, engagement strategies, identification of complementary or parallel programs, braiding and stacking strategies, IT/System of Record tools and considerations and overall program research. Market Analysis The Egis Team will work collaboratively with the State of Nebraska to analyze the existing marketplace in three primary areas: 1. Existing efficiency/utility/housing program across the state of Nebraska. 2. Workforce a. Identification of qualified contractors network and their respective core competencies, capacity and geographic reach. b. Identification of career and vocational training entities that could assist in closing contractor capacity gaps. 3. Potential Program Partners – In addition to the partners already identified by the Nebraska, and using our experience from developing these programs in other

	states, identify additional key stakeholders and program partners that can best help deliver these programs efficiently and effectively to Nebraskan residents.
2	Bidders should describe their proposed approach to: Developing a high-level program design strategy, including the subtasks noted in Part I #2 of Requested Tasks. The bidder should identify key issues they expect the state will need to consider when developing its program design and how those issues will be addressed through the bidder's support of the program design. Response: A Proven, Step-by-Step Approach for IRA Rebate Program Implementation The Egis Team provides the NDEE with a collaborative and comprehensive approach to creating an impactful and compliant program for Nebraska residents. Our six-phase process, successfully deployed in multiple states on these IRA home energy rebate programs, is outlined below. Each phase in this thoughtfully designed process builds upon the previous and is grounded in a methodical and collaborative approach with the NDEE Team.  <pre> graph LR S1((Step 1: Identification of Nebraska's goals & objectives)) --> S2((Step 2: Proactive risk identification & mitigation)) S2 --> S3((Step 3: Aligning Nebraska's goals & risk mitigation strategies with key program decisions)) S3 --> S4((Step 4: Development of program application/ narrative checklists)) S4 --> S5((Step 5: Completion of program blueprints)) </pre> Step 1: Reviewing Nebraska U.S. DOE Checklists, Blueprint Plans & Budget Workbook Based on our industry-leading expertise in helping Indiana, Ohio, Arizona, Florida, South Carolina, and Pennsylvania design and implement their IRA programs, we can share lessons learned, best practices, or other strategies being deployed by other states that may help inform the final program design. Step 2: Identify Nebraska's Goals & Objectives There are several possible goals and objectives that can be accomplished through these energy rebate programs. The Egis Team will work collaboratively with the NDEE Team to identify what these should be for Nebraska. Below is a sampling of those goals: • Compliance • Maximize local job opportunities • Achieve statewide reach • Cost-effective and efficient • Seamless applicant experience • Fast-track career readiness • Collaborating with Community Action Agencies (CAAs) • Maximize benefits to low-to-moderate income (LMI) households • Energy affordability (reduce energy consumption)

- Maximize contracting opportunities for Nebraska businesses and service providers
- Low administrative burden
- Uniformity and standardization
- Achieve Justice 40 (J40) goals
- Collaboration with tribal communities

Our program design team will work collaboratively with the NDEE and other stakeholders to prioritize objectives and align the program design and delivery plans to best position the State to achieve your objectives.

Step 3: Proactive Risk Identification & Mitigation

For the NDEE to maximize the impact of these funds, it is imperative to proactively identify the challenges and impediments to achieving the strategic objectives. These programs carry many common challenges associated with other federally funded programs.

However, our experience has proven that energy rebate programs are complex from a design and delivery standpoint and present a variety of unique obstacles. Our team is uniquely aware of these challenges because of our combined work managing \$80 billion in federally funded programs and the previously mentioned states' IRA Rebate Programs. Some of the challenges that specifically apply to these programs, which must be addressed during design and monitored throughout implementation, are:

- Multi-layered federal and state compliance
- Applicant confusion
- Fraud, waste, and abuse
- Contract capacity
- Landlord rent restrictions
- Equipment scarcity and supply chain shortages
- Lack of public awareness
- Energy auditor scarcity
- Changing federal reporting requirements
- NDEE staff capacity
- Achieving J40 requirements
- Programmatic IT/system of record needs
- Applicant cost-share requirements
- Multi-family units applicant cost-share requirements

Detailed aspects of the design process will include a number of considerations such as eligible households, type of upgrades, income verification, rebate amounts, cost caps, education and outreach strategies, developing and managing qualified contractor networks, data collection, compliant reporting, accurate forecasting, and continual review of U.S. DOE guidelines and federal regulations.

Step 4: Aligning Nebraska Goals & Risk Mitigation Strategies with Key Program Decisions

Upon completing the two activities outlined above, the State of Nebraska can embark upon exploring several activities, key considerations, and strategic decisions that will help formulate program design, answers to the state's U.S. DOE application, and inform the development of the U.S. DOE Blueprint Plans. Outlined below are the categories of activities and key considerations, and a more detailed narrative can be found throughout this technical response to this request for proposals.

 Key Consideration 1 Stakeholder Engagement	 Key Consideration 2 Distribution of Resources	 Key Consideration 3 Modeled vs. Measured Rebate Program Decisioning	 Key Consideration 4 Marketing Strategy to Raise Awareness, Foster Trust, & Encourage Program Participation	 Key Consideration 5 Identification of Program Pathways	 Key Consideration 6 Early Identification of Complimentary Programs
 Key Consideration 7 Coordinated Funding Streams	 Key Consideration 8 Early Engagement & Coordination with Alabama Utilities	 Key Consideration 9 Workforce Development Planning			

Bidders should describe their proposed approach to:

Designing and conducting stakeholder outreach, including the subtasks noted in Part I #3 of Requested Tasks. The bidder should identify known stakeholders within the state, strategic recommendations to support collaboration, and lessons learned from similar engagements that the bidder will use to support this task. Bidders should describe their proposed approach to collaborating with industry partners and other experts.

Response:

The Egis Team has developed and successfully executed statewide stakeholder outreach and engagement for these IRA Rebate Programs and provides the state of Nebraska with lessons learned and best practices to ensure thoughtful engagement is achieved. Here's a broad overview of the type of stakeholders we have experience engaging with. We have proactively identified local Nebraska stakeholders in our Education and Outreach and Community Benefits Plans, located in our attached work plan.

3

Stakeholder Category	Purpose of Engagement	Engagement Methods
Consumers Applicants	- Impression of energy costs, needs, concerns - Familiarity with other federal rebate programs - Identification of community thought leaders (potential program surrogates) - Interest in specific rebate offerings - Which marketing channels best reach the audience - Interest in energy industry jobs	- Town hall meetings leveraged by State and local elected leaders - Forums facilitated by faith-based & non-governmental organization (NGO) community leaders - Online survey - Online platforms such as Nextdoor - Neighborhood Association meetings - Partner with locally owned grocery stores

			strategically located in J40 windows
Workforce Development	• Program offerings • Existing curriculum • Demographics of existing student population • Existing programs in following areas: ○ Electricians ○ HVAC Technicians ○ Insulation workers ○ Building Analyst Technicians and Professionals ○ BPI Energy Auditors ○ BPI Building Science Principals ○ HERS Raters	• 1-on-1 meetings with senior leadership at Career Techs, Community Colleges, and other educational institutions • Educational and non-profit institutions focused on workforce development	
Contractors	• Familiarity with energy rebate programs • Skillset and expertise • Financial capacity • Familiarity/Experience with government contracting • Workforce capacity • Labor Shortages (specifically skilled trade positions required for installation) • Geographic reach • Designation as minority, woman, veteran owned business • Wages/Davis Bacon	• Contractor Surveys • Industry forums • Information from HVAC and building trade industry associations	
Special Interest Groups	• Proven community partner with decades long history of serving J40 communities and depth of knowledge of our target audience • Understand constituents needs and concerns • Communicate and educate on program benefits and build support • Identify contractors – veteran, woman or minority- owned that they may wish to engage	• 1-on-1 • In-person and virtual meetings with targeted populations • Distribution of fact sheets • Listening sessions to learning what benefits constituents and what brings trust	

	CAAs and Weatherization Partners	• Agency Capacity • IT and other Weatherization systems currently in place • Marketing tactics • Identification of community leaders • Challenges to program participation • Ability/interest in braiding Weatherization with IRA rebate programs • Energy Auditor Capacity	•
	Utilities	• Current rebate offerings • Marketing tactics and return on investment • High performing rebate contractors • Proactive identification of labor shortages • Program integration/collaboration strategies	• Surveys to utility program managers • 1-on-1 meetings • Contractor / trade ally workshops
I.b. APPLICATION SUPPORT			
4	Bidders should describe their proposed approach to: Establishing an application project management plan and timeline, including the subtasks noted in Part II #1 of Requested Tasks. The bidder should describe 1) how it will develop and maintain a plan and timeline, 2) how it will build in flexibility, 3) what important components it will track to support an efficient and effective process, 4) and what tools they use to ensure projects stay on track. The bidder should share examples of program implementation plans, and/or describe previous experience with preparing funding applications.		
	Response: Having successfully collaborated with the states of Indiana, Ohio, Florida, Arizona, Pennsylvania, and South Carolina on their application and blueprint plans, the Egis Team provides the state of Nebraska with a thoughtful and collaborative approach to methodically aligning program goals and objectives with the DOE required deliverables. Developing a Critical path Upon NTP, the Egis Team will meet with the State of Nebraska and align our workplan and proven IRA Rebate Program tactics with the desired schedule for completion and submission to the US DOE. Through our work with other states, we have identified a number of strategies that can accelerate this process long with best practices to facilitate		

thoughtful and statewide outreach to program stakeholders and potential partners. See attachment:

IN IRA Single Family Project Plan (Preliminary)

smartsheet

Task	Q3 2024			Q4 2024			Q1 2025		
	Jul 2024	Aug 2024	Sep 2024	Oct 2024	Nov 2024	Dec 2024	Jan 2025	Feb 2025	Mar 2025
Application									
Application Create List of Application Questions									
Application Client Approval / Comment Review & Feedback Period - App Questions									
Finalize Application Process Solution									
Call Center Operations									
Call Center Operations Create Operational Plan									
Call Center Operations Team Admin & Setup									
Call Center Operations SOP & Program Materials									
Client Reviews & Approval - Call Center									
Call Center Operations Staffing (Call Center Rep/CCR)									
Call Center Operations Training									
Call Center Operations Ready for Launch, Single Family									
Case Management Operations									
Case Management Operations Create Operational Plan									
Case Management Operations Team Admin & Setup									
Case Management Operations SOP & Program Materials									
Client Review & Approval - Case Mgmt									
Case Management Operations Staffing (Case Manager)									
Case Management Operations Training									
Case Management Operations Ready for Launch, Single Family									
Field Services Operations									
Field Services Operations Create Operational Plan									
Configure & Test Home Energy Modeling Tool (SnuggPro)									
Configure & Test Quality Install Tool									
Field Services Operations SOP & Program Materials									
Client Review and Approval - Assessment									
Client Review and Approval - Project Verification									
Field Services Operations Staffing (Assessor/QA)									
Field Services Operations Training									
Field Services Operations Ready for Launch									
Rebate Fulfillment Operations									
(Prelim) Rebate Fulfillment Operations Create Preliminary Operational Plan									
(Prelim) Rebate Fulfillment Operations Enterprise Tools									
(Prelim) Rebate Fulfillment Operations SOP & Program Materials									
(Prelim) Client Review and Approval - Rebate Fulfillment									
(Prelim) Rebate Fulfillment Operations Staffing (Elisner/Amper)									
(Prelim) Rebate Fulfillment Operations Training									
(Prelim) Rebate Fulfillment Operations Ready for Launch									
Monitor & Refine Rebate Fulfillment Operations									
(Finalize) Rebate Fulfillment Operations									
Data Analyst Operations									
Data Analyst Operations Create Operational Plan									
Data Analyst Operations Staffing (Data Analyst)									
Data Analyst Operations Training									
(Prelim) Data Analyst Operations Create Prelim Reports / Dashboards									
(Prelim) Data Analyst Operations Client Reviews of Prelim Reports / Dashboards									
(Prelim) Data Analyst Operations Ready for Launch									
Monitor and Intake of Program Data									
(Final) Data Analyst Operations Create Reports / Dashboards									
Contractor Operations									
Contractor Operations Create Network Launch Plan									
Contractor Operations SOP & Program Materials									
Client Review and Approval - Contractor									
Contractor Operations Website Portal (Intake)									
Contractor Operations Contractor Intake & Selection									
Contractor Operations Onboarding									
Contractor Operations RFQ for Pricing									
Contractor Operations Ready for Launch									
Program Documentation (Program Handbook, Tutorials, FAQs)									
Create Program Documentation (Program Handbook, Tutorials, FAQs)									
Client Review & Approval - Program Docs									
Utility Coordination									
Utility Coordination Create Operational Plan (more details soon)									
iEnergy									
iEnergy Development & Configuration									
iEnergy Client UAT Testing									
iEnergy Implement End to End Testing Fixes									
Launch Final Steps									
Client Approval for Single Family Go Live									
IN IRA Single Family Launch / Go Live									

5

Bidders should describe their proposed approach to:

Developing program application materials, including the subtasks noted in Part II #2 of Requested Tasks. The bidder should describe ways that it will support the state in 1)

	developing a comprehensive application that fulfills program requirements while incorporating state program design objectives, 2) communicating with DOE throughout application process, 3) navigating the DOE application review process, and 4) ensuring key timelines are maintained. Response: A Proven Approach to Application Development Having successfully guided numerous state energy offices through the application review and approval process for these IRA Home Rebate programs, the Egis Team is uniquely qualified with the state of Nebraska to design the most impactful program that aligns with DOE requirements and state objectives. We will work collaboratively with the NE team to determine scope, schedule and responsible parties, and based on that will develop a clear and concise project schedule that is agreed upon by the state team. From there we will hold weekly meetings to ensure these items are being met in the agreed upon schedule. Proven Relationships with Key DOE Program Staff For nearly one year our design and delivery teams have been working collaboratively with the US DOE to enhance clarity on program requirements, proactively identify risk and challenges with mitigation strategies, along with developing national best practices for: • Consumer protection • Disadvantaged community participation • Contractor engagement • Integration of IRA Rebates into public housing authorities • Potential program braiding opportunities with utility, state & local funding sources Simplifying the DOE Application Review Process Having successfully completed the application process for multiple states, our team combines proven relationships with DOE staff, along with a clear understanding of DOE's expectations of application deliverables. This experience can streamline the application development and review process, thus reducing administrative costs and best positioning the state of Nebraska to accelerate program launch.
I.c. STATE PROCESS SUPPORT	
6	Bidders should describe their proposed approach to: Providing project management and coordination, including the subtasks noted in Part III #1 of Requested Tasks. The bidder should describe their typical approaches for engagements, such as how they will support the state to ensure the programs and plans stay on track and are effectively coordinated. Response: Key Performance Indicators • Total allocation and funds distributed • Resource tracking related to braided funding sources • Performance monitoring of paid media spend • Application KPIs (total number, percentage by categorical eligibility, geographic breakdown, J40 communities, processing time, and percentage accepted/denied) • Funds distributed by pathway (single family, multi-family, and CAAs) • Total funds invested by benefit (heat pump, water heater, appliance, etc.) • Energy saved

- Timeline tracking for audit scheduling to completion
- Contractor performance metrics (total households served, contract funds remaining, punch list completion, average time for task order completion, etc.)
- Call center metrics (call volume, answering time, FAQs)
- Workforce development and job creation metrics (by trade, discipline, etc.)
- J40 tracking (percentage of funds invested, jobs created, and contracts awards)
- Average utility bill savings

The PMP will serve as the internal operations manual for implementation. The plan will provide specific information about the program design, rules, policies, and procedures that determine program administration and customer participation.

The Egis Team's Project Management Plan (PMP) will include all the DOE-required Blueprint materials to set Nebraska up for compliant, effective implementation of the 50121 and 50122 programs. As such, the PMP will consist of the six DOE plans required to have the first tranche of the implementation budget released

In addition to the DOE-required and supplemental plans we recommend, the PMP will also include:

- Program overview, including objectives
- Target participant segment
- Participant eligibility
- Measure eligibility
- Project workflows

The Egis Team has a strong record of successfully managing projects for utilities across North America. We will apply our best practices to provide the state with effective, efficient, and transparent project management that supports timely program launch and delivery.

Executive Leadership. The Egis Team will provide executive oversight and ensure we are meeting the state's goals. We have a keen understanding of energy efficiency program delivery and the nuances of delivering IRA-funded programs

Program Management. Mark Opelka will serve as the state's day-to-day contact. He will provide project accountability and coordinate program delivery across our team and oversee all project and partner documentation and tracking, including:

- Program implementation
- Contract management
- Project planning
- Scope development
- Payment and reporting

Program Tracking to Ensure Alignment with Schedules and Budgets. The Egis Team will ensure we achieve all projects on time and within budget. Our team will identify potential project management issues, such as a delay in a task, and develop strategies to prevent or mitigate the impact. We will oversee the implementation of verification and QC processes to confirm we complete projects to the highest quality and expectations, and

participants receive a satisfying experience with the program and our network of local contractor trade allies. Integrated Project Management Best Practices. Our program team will integrate the following project management best practices and a partner-focused approach to delivery: We will define a clear project plan that includes project schedules, responsibilities, and milestones. The project plans and schedules guide the functional teams in effective planning toward deliverables We use our software to track projects, measures, savings, and payments. We configure our software to meet the needs of numerous energy efficiency programs and can easily expand the platform to address the state’s specific needs. The iEnergy program tools will be updated at least weekly to plan and allocate resources to tasks. We will review, report, and process updates with the state at least weekly We will hold weekly internal meetings with the program team to stay informed about resource allocation, proactively identify potential program management issues and develop and implement mitigation strategies Our standardized program action item tracker will be updated weekly, which includes a summary of all action items, responsibilities and due dates and key decisions. On a monthly basis, the Egis Team will develop a status report outlining tasks completed in the last period, upcoming tasks, identification of any risks/challenges, and mitigation measures to address risks/challenges We will hold recurring project meetings to inform the state about resource allocation, proactively identify potential project management issues and develop and implement risk mitigation strategies. We will also schedule and host recurring project meetings with our contractor network to track their progress, help them address barriers and issues, and provide support Our cohesive and effective project management and staffing structure will ensure our team works together to deliver the highest caliber of services that meet the objectives defined by Sections 50122 and 50121 of the IRA and the State of Nebraska.
--

PART II. PROGRAM IMPLEMENTATION: HOME EFFICIENCY REBATES (IRA SECTION 50121) –

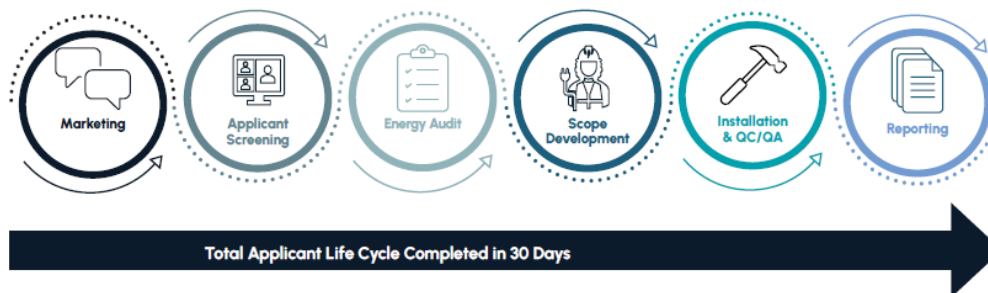
a. GENERAL DELIVERY APPROACH

Bidders should describe their proposed program will address:

The overall program approach and how homeowners and multifamily building owners will interact with the program (i.e., customer journey).

Response:

Having designed and implemented billions of dollars in federally funded efficiency and housing programs, the Egis Team has developed a technical approach that simplifies and streamlines the applicant experience. We are currently deploying a multifaceted strategy to raise program awareness, foster trust, and drive program participation for both single family and multifamily properties. This approach primarily driven through marketing, our website and our call center affords applicants the ability to participate in both 50121 & 50122 with a single application. Further, we are working collaboratively with utilities across the US to execute data sharing agreements to eliminate the applicant burden associated with collecting this information. Finally, based upon extensive engagement with contractors, we are collecting income and other PII to make an income eligibility determination and reducing this burden that would have been borne by the contractors. Outline in the graphic below is our typical business process for a single family homeowner.



A Simple Experience for Multifamily Building Owners

There is unique complexity associated with multifamily buildings and coordination and communication with the tenant population. Having successfully weatherized thousands of multifamily units across the US, the Egis Team provides proven tactics and methodologies to simplify the experience for both tenants and landlords. However, it is imperative to note that many landlords have expressed apprehension about program participation due to rent increase restrictions that could be put in place if they participate in the program. To mitigate this challenge and to ensure state's can achieve the multifamily investment requirement the Egis Team has been working hand in hand with the US DOE, HUD, and various state housing agencies to develop and IRA Rebate strategy focused on public housings authorities and LITEC properties throughout the US.

Our multi-family strategy maximizes the utilization of categorical eligibility, make significant disadvantaged community investment and eliminate many of the barriers associated with MF property participation. This approach has been described as the national blueprint for the integration of IRA Rebates into multifamily properties.

8	Bidders should describe their proposed program will address: The structural barriers they expect to face and how they will overcome these through program delivery. Response: Having designed and deployed over 750 energy efficiency programs nationwide and most recently helping design and develop 6 state's IRA Rebate programs, The Egis Team provides decades of knowledge and expertise along with unparalleled working with state energy offices and the US DOE on risk analysis and problem solving for these IRA Rebate programs. As outlined in our methodical program design approach, we work collaboratively with our clients to proactively identify risks and other market factors that could adversely impact the success of these programs. Many of these risks and mitigations strategies become KPIs that we monitor throughout the lifecycle of the program to ensure that we are delivering an efficient, effective and compliant program to the citizens of Nebraska. We are proud of the fact that recent guidance issued by the DOE has been driven by the Egis Team as we identify programmatic challenges associated with agency rulemaking. More specifically the recent guidance on contractor payments on 50121 multifamily building was driven by the Egis Team working with the DOE and HUD working on a multifamily pilot in the state of Indiana.
9	Bidders should describe their proposed program will address: The bidder's general approach and an overview of innovative ideas for achieving priority program objectives. Response: The attached work plan includes a wide variety of innovative ideas harnessing industry best practices in energy efficiency delivery along with our extensive designing and implementing federally funded housing assistance programs. Our approach, grounded in federal compliance does the following: Simplifies the applicant experience by: • Maximizes categorical eligible • Establishes call center • Fosters partnerships with statewide network of nonprofits and program partners • Executes utility data access agreements to retain consumption data on behalf of applicants Reduces barriers to contractor participation by: • Providing auditors for the program rather than burdening contractors • Creating a simplified invoicing process to decrease administrative burden • Fast tracking invoice processing and payment • Performing income eligibility determinations thus eliminating need for contractors to review PII of applicants. Protects consumers by: • Utilizing auditors as agent of the program vs the contractor • Establishing controls to minimize risk of PII exposure • Providing a SOC II certified System of Record to protect data integrity • Developing a qualified contractor network with appropriate safeguards • Conducting quality control inspections to ensure work performed is up to program standards • Ensuring utility bill savings for participating households

	A more detailed narrative that describes these concepts can be found in the work plan attached.
10	Bidders should describe their proposed program will address: How will the bidder prioritize projects that create disproportionately greater benefits due to location or timing of retrofit? Response: The Egis Team provides extensive experience in the design and implementation of federally funded income qualified housing and energy programs. Our historical approach has been to create a uniform and standardized program that treats each program applicant equally and ensures each applicant is provided the maximum benefits allowed under program rules. We historically have not provided preferential treatment to one applicant over another. If selected, we can work collaboratively with the state to gain a better understanding of project prioritization without jeopardizing federal compliance.
II.b. EDUCATION AND OUTREACH	
11	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: How will the bidder educate customers and contractors about Home Efficiency Rebates? Response: The Egis Team has extensive experience marketing and educating consumers and contractors across the various energy efficiency programs and the IRA Rebate Programs we are currently designing and implementing. As a result, our education and outreach plan in the attached workplan highlights a number of marketing opportunities, methods and practices that have previously been used, but we will work collaboratively with the state of Nebraska and NDEE on a multi-faceted approach that best suits the environment and populations across the state. Some of these tactics include but are not limited to: • Stakeholder engagement • Virtual town halls and public meetings • Earned and paid media • Roundtable discussions • Online and in person surveys • Toolkits for program partners • Media kits • Co-branding and Co-Messaging opportunities
12	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: How will consumers access information and be encouraged to participate in the program? Response: Campaign Execution

The Egis Team will execute all aspects of the campaign strategy, including paid media, traditional public relations and grassroots marketing, and owned media. **Based on our extensive experience in other federally funded individual assistance programs, we see that, on average, it takes a minimum of seven times for a target consumer to see an ad and then take action on the message.** We will ensure that target consumers see our ads seven times through the following:

Paid Media—Generating Awareness Through Advertising

Our team will develop a comprehensive paid media plan to generate awareness through advertising. It will be responsible for all placement and coordination of advertising across multiple media channels on connected devices and offline experiences throughout Nebraska’s singular designated market area. Tactics could include:

Digital Advertising, including Social Media, Digital Display, and YouTube:

Tactically, digital and social media ads will be deployed first to generate broad awareness and capture user data. Then, we will use ad targeting, search and re-targeting, and geo-targeting to place ads in specific J40 neighborhoods designed to convert users (i.e., apply).

Over-the-top (OTT): Television, Pre-roll Advertising, and Programmatic Radio: Broadcast television and radio are shrinking markets. Our team will instead use OTT, pre-roll ads, and programmatic radio (e.g., Pandora and Spotify) to generate broad awareness and capture audience data, allowing for targeting, geo-targeting, and re-targeting.

Out-of-home Advertising (Billboards, etc.): Out-of-home advertising is a layer that reinforces other offline and online efforts and is incredibly impactful when reaching underserved and minority audiences.

Public Relations (PR)

PR will include earned media by engaging with print and broadcast reporters to help explain the program and the need for eligible Nebraska residents to participate in the energy rebates program, establishing a partner coalition to serve as third-party advocates that validate the program.

We will also develop a coordinated grassroots community relations team to appear at events throughout Nebraska to engage target audiences, particularly J40 audiences.

Owned Media

The Egis Team will design and build all necessary elements of a microsite to educate and convert users while capturing robust data to serve re-targeted advertisements.

The Egis Team will set up new social media pages for the campaign, leveraging social channels that frequently target audiences, such as Instagram.

Maximize Awareness & Participation Through Categorical Eligibility

The U.S. DOE has encouraged states to utilize categorical eligibility for these energy rebate programs. Our team will work collaboratively with the NDEE and other state agencies to maximize program participation with Nebraska residents currently participating in Low Income Home Energy Assistance Program, Low Income Household Water Assistance Program, TANF, Supplemental Nutrition Assistance Program, and other federal programs that meet the eligibility criteria. We can develop outreach tactics that these other programs can utilize to accelerate program participation for those most in need.

	Developing Program Collateral & Printed Materials We will collaborate with the NDEE to design and distribute printed materials for communities with limited access to online resources to raise program awareness and participation. Our initial market research has identified several communities that lack broadband access and require more comprehensive outreach, including printed materials. Please see our Education and Outreach Plan in our Workplan for more detailed information.
13	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: How will the bidder promote other federal programs and encourage stacking and braiding with non-federal programs, including other incentives, and financing offerings? Response: The Egis Team provides NDEE with experience in various federal funding sources, which can be braided with these rebate dollars and in breaking down barriers between government agencies to address fundamental program challenges that may impact the program's success. Our funding specialists have designed and managed complex federally funded portfolios and are well-versed in multiple funding sources. Key Considerations The 50121 and 50122 programs contain a cost-share gap that, if not closed, creates a significant barrier to program participation, especially within Nebraska's LMI population. This gap equates to a homeowner contribution of 20% of the total benefits afforded, thus requiring the homeowner to front thousands of dollars to receive the program's benefits. Nebraska can combine these rebate dollars with other federally funded utility and state programs to maximize the impact on a household-by-household basis. This decreases administrative costs and maximizes the outcomes for Nebraska homeowners. Additionally, many applicant homes may have pre-existing conditions that preclude their eligibility in the program. These conditions could include leaky roofs, mold, etc., which may not be able to be addressed with program dollars; therefore, alternative funds must be identified to provide "preparedness" resources similar to the U.S. DOE Weatherization program approach. Our Experience with Braiding Funds <i>Technical Approach to Maximizing Program Impact</i> The Egis Team will work collaboratively with NDEE's team to identify appropriate partner agencies and programs to integrate into the overall benefits package for Nebraska residents. In addition to coordinating with other agencies across Alabama to provide a more efficient and easy rebate process for applicants, our funding SMPs will work collaboratively with NDEE's team to identify funding sources that can be compliantly braided with the rebate dollars to close the cost-share gap, decrease the likelihood of applicant "walk away," and maximize the impact of all funding sources within each household. Potential Funding Sources could include: • HAF

	• Weatherization Funds • CDBG Formula Funds • Unencumbered Rental Assistance Funds • EECBG • Grant Funds • Utility Incentives • Philanthropic Contributions • ARP Funds • IRA Funds • Nebraska LIHEAP Coordinated Funding Streams Complementing program rebates with other funding sources, like weatherization program funds, utility rebates, and financing, can break down cost barriers and make energy-efficient equipment purchases more affordable. We will leverage our national experience to incorporate these other funding sources. New partnerships could also be identified to bring private and public funding sources into the energy efficiency market. The Egis Team can create partnerships with market actors to make financing more available and empower them with tools to help them assess the financial viability of projects. Where available, PACE financing could also be leveraged.
14	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: What partnerships and channels will the bidder utilize for outreach? Response: Our team brings the NDEE extensive experience in marketing, outreach, and engagement specific to increasing public awareness of and demand for energy rebates and other federally funded individual assistance programs. Using comprehensive market analysis, we will begin by gaining an understanding of previous applicant participation in energy programs, statewide customer demographics, current service provider coverage, and existing community partner relationships. The data will inform how we target underserved regions and customer segments and define marketing and outreach goals and efforts. This analysis will also identify capacity-building opportunities for community partners and local contractors who can provide customer outreach, education, screening, and enrollment. To drive targeted acquisition, we will draw on our experienced creative team to develop an innovative and recognizable campaign identity that resonates with identified target audiences. An audience-centric message framework capturing key messages, messengers, and channels that are compelling for each audience, and campaign identity concepts that will be refined to a single creative narrative are included in this phase. Implementation would consist of creative video, voice, and social ad content. Income-Qualified & Underserved Communities: Our development process begins with research to understand market needs and where program resources are needed

most. Our plan prioritizes income-qualified and underserved communities. Our team's work within these communities has taught us that we can offer health and safety measures beyond energy-saving opportunities to improve indoor air quality and combustion safety, avoid mold infestations, and detect carbon monoxide. While we would not exclude residents who do not meet income qualifications, our recommendation would be to prioritize funds and services to residents who need it most based on income needs, age, health issues, and other qualifying factors we can work with the NDEE to define.

Geographic Targets: We recommend layering geographic priorities to focus resources/funds. Public resources, like DOE's Low-Income Energy Affordability Data (LEAD) Tool, Climate & Economic Justice Screening Tool (CJEST), U.S. Energy Information Administration (EIA) data, and ArcGIS Living Atlas of the World, have incorporated census tract data to identify low-income communities nationwide.

Public Housing Authorities: We bring experience working with PHAs and low-income property managers. Leveraging relationships and other public resources, we will work with NDEE to establish a plan to get resources to residents who need them most.

Community-Based Coordination: Our plan for NDEE's disadvantaged communities will utilize trusted community leaders - like Nebraska's nine CAAs, partner with local organizations and faith-based institutions, and conduct outreach events in diverse neighborhoods to build trust, address concerns, and maximize participation.

Utilities: We will leverage existing relationships at Omaha Public Power District and MidAmerican Energy, industry best practices, and proven marketing tactics to partner with utilities, municipalities, and cooperatives to maximize awareness and drive program participation. Examples of this outreach and marketing will include utility bill inserts, advertising on utility websites, and leveraging the limited number of rebate programs currently operational in Nebraska.

Contractor Outreach Strategy

Planned Activities for Contractor Outreach

The Egis Team knows that contractor capacity and interest in these programs will be a challenge to the timely deployment of program funds. It is imperative that we thoughtfully engage the contracting community on a statewide basis, inclusive of existing WAP partners, as well as contractors that have not historically participated in federally funded or stated administered programs. The Egis Team has proactively identified numerous data points that we would seek to collect through this contractor engagement, they include but are not limited to the following:

- Familiarity with energy rebate programs
- Skillset and expertise
- Financial capacity
- Familiarity/experience with government contracting
- Workforce capacity
- Labor shortages (specifically skilled trade positions required for installation)
- Geographic reach
- Designation as minority, woman, and/or veteran-owned business

Outreach Channels

	The Egis Team has extensive experience and partnerships among the Nebraska contracting community. We will utilize proven strategies to engage, educate, and recruit contractors and skilled trade professionals interested in participating in the program. <i>Schedule for Executing Education & Outreach Activities</i> The Egis Team knows raising awareness of these programs will require a multifaceted approach during the planning phase and throughout the lifecycle of these initiatives. We would expect to complete the planning, outreach, and engagement within the schedule identified in the RFP; however, we believe ongoing contractor and community engagement will be critical to the timely distribution of funds and the success of these rebate programs. We will work collaboratively with the NDEE to develop both an earned and paid media strategy that will ensure continued engagement and interaction with these programs. Please see our Education and Outreach Plan in our Workplan for more detailed information.
15	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: How will the bidder reach out to and recruit contractors? Response: The Egis Team has developed a multifaceted approach to the identification, development and engagement of a qualified contractor network for these IRA Rebate programs. This approach includes but is not limited to; • Engagement with Trade Associations & Chambers of Commerce during stakeholder engagement phase • Outreach to Weatherization Contractors and Community Action Agencies • Identification of high performing contractors currently participation in utility efficiency programs • Coordination with various state agencies to identify small and disadvantaged businesses • Establishing a program website to raise awareness and solicit feedback More information can be found in our work plan in the education and outreach section.
16	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: How will the bidder track effectiveness of outreach and education efforts and materials? What metrics does the bidder propose to develop and use to measure effectiveness of education and outreach efforts? Response: As noted in the stakeholder table above, during stakeholder engagement we collect outputs or data points each identified stakeholder group. As outlined in our education and outreach strategy included in our work plan, we work collaboratively with the state to develop a program specific marketing plan grounded in best practices and understanding of the state of Nebraska. Additionally as outlined in our attached program plan, we typically use measurable and trackable marketing strategies, such as digital, social and search engine marketing where we can provide real time tracking of the

	effectiveness of these marketing solutions. By using these types of tactics, we can adjust the plan as needed, based on participation numbers, job workflows etc.
17	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: How will the bidder ensure outreach, education, and marketing efforts are reaching the appropriate audiences? Response: Our approach as outlined in our education and outreach plan, we identify a variety of tools and tactics to reach the various audiences necessary for successful programming. They include but are not limited to: Contractors, CAA's, Single family households, tenants, landlords, trade associations, along with other interested parties. Further, our tactics are measurable, trackable and reportable and can be geographically targeted to ensure statewide reach for the overall program. Our tactics rely heavily on a digital presence, but based upon the objectives of the Nebraska program, we will work collaboratively on a plan that is appropriate based upon the audiences we intend to target across the state.
18	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: How will the bidder support the state to facilitate at least one public input session and incorporate feedback into program design? Response: We have performed extensive public input sessions in each of the states where we are designing and implementing these IRA Rebate Programs. Although the US DOE only requires a single meeting, we would encourage the state to develop a more robust engagement strategy for a multitude of reasons. We can share our experiences, along with detailed information regarding what some of your other state peers have done to facilitate broad engagement and outreach and help inform program design.
19	Bidders should provide the following information about how their approach will address outreach, marketing, and education, including a timeline and budget for associated activities for single-family homeowners and multifamily building owners: How will the bidder support the state in their development of the Education and Outreach Strategy, including their proposed approach to developing the strategy, key content within it, and how the above activities will be incorporated into the strategy? Response: In the attached work plan we have provided a detailed technical approach for the Education and Outreach strategy. This workplan is grounded in industry best practices, along with lessons learned from other states on engagement activities for these IRA Rebate Programs. Our approach can serve as a solid foundation and can be refined through thoughtful collaboration with the state of Nebraska.
II.c. HOME ASSESSMENTS	

20	Bidders should describe the home assessment process for both single-family and multifamily projects, including: How will the bidder ensure that a home assessment is performed where required?
	Response: As outlined in Egis' business process, we believe the auditor should be an agent of the state/program versus an agent of the contractor. This approach reduces the need for small business/contractors to obtain auditors and protect consumers choosing to participate in the program. The Egis Team conducts thousands of energy audits annually and is well positioned to provide a statewide network of auditors for the state of Nebraska.
21	Bidders should describe the home assessment process for both single-family and multifamily projects, including: How will the bidder ensure assessments are done in compliance with ANSI/BPI 1100-T-2023 and ANSI/BPI 1200-S-2017, where applicable?
	Response: Our team takes a holistic approach to Quality Management that incorporates proactive and continuous quality management processes at every level of our day-to-day operations of the program. We begin with setting clear expectations for energy auditors from the outset and reinforcing expectations through regular training. Initially, we will provide a program overview, outline participation requirements and expectations, then reinforce them during our regular interactions. We will also analyze audit and project data and inspection results to identify auditors who may need additional training. Conducting ride-alongs with participating auditors is a key element of our ongoing training. We will accompany program auditors on a higher sampling of projects at the beginning of their program participation to validate that audits are being completed correctly and identifying appropriate opportunities and providing an appropriate level of education to the customer. We will offer feedback on how to improve service delivery and/or suggest adjustments needed to meet program standards.
22	Bidders should describe the home assessment process for both single-family and multifamily projects, including: The process for and how the bidder will ensure all required information is collected during the home assessment.
	Response: Leveraging our experience previously launching a 50122 program we are well versed in the data collection procedures for QEPs. iEnergy is our end-to-end energy program management platform, offers a centralized data repository to securely collect, store, track, and report on the project, participant, funding, and program data while reducing state administrative and implementation costs.
23	Bidders should describe the home assessment process for both single-family and multifamily projects, including:

	How will the bidder review and validate home assessments for accuracy?
	Response: As part of our continuous quality management processes, we randomly analyze audit and project data and inspection results to validate results and identify auditors who may need additional training.
24	Bidders should describe the home assessment process for both single-family and multifamily projects, including: How will the assessor collect and report information to the bidder and how will that data be managed? Response: Our business model has thoughtfully integrated into our system of record, and the auditor is an agent of the bidder.
II.d. ELIGIBILITY AND INCOME VERIFICATION	
25	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings as a whole, including: Describe the methodology (and determined software) to calculate the rebate level based on income and energy savings. Response: The Egis Team's rebate process system (iEnergy) provides an intuitive, mobile-friendly application portal developed specifically for IRA requirements, including integration with the DOE/ PNNL APIs to ensure rebate amounts comply with program requirements. Rebate applicants will only be approved for the rebate amounts (and percentages) associated with their income level (e.g., below 80% AMI; between 80 and 150% AMI) and the product type they intend to purchase (e.g., heat pump water heater, cooktop). Additionally, the system checks against all previously issued rebates to enforce rebate maximums.
26	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings as a whole, including: How will the bidder determine which upgrades and equipment are eligible for the program and the process to update the allowable measures? Response: As projects and equipment are scoped out - we cross-check with the DOE Qualified Products List (QPL), this functionality is currently embedded in iEnergy.
27	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings as a whole, including: How will the bidder ensure that the ENERGY STAR certification requirement for heating, cooling, and water heating products is adhered to? Response: The QPL functionality in iEnergy also cross-references with ENERGY STAR® certified products list.

28	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings as a whole, including: How will the bidder verify the income levels of applicants and multifamily buildings? Response: iEnergy's income verification feature enables the applicant to select categorical programs, if applicable, or provide income levels for household members. Documentation, required for income verification, is reviewed and validated by case managers.
28.1	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings as a whole, including: What methods will the bidder implement to randomly sample applicants to confirm income level (especially if for self-attestation)? Response: All participants will be required to sign an attestation that they have fully disclosed all relevant income information, which includes language that if falsified, program participants will be liable for the expense associated with the investment. Given the significant investment for each project through the program, our team will clearly communicate requirements and restrictions throughout the process, audit property information as necessary to ensure compliance, and continually evaluate the strength of requirements, processes, and authorization forms. Given recently updated guidance from the DOE and the Office of the Inspector General (OIG) on the risks surrounding self-attestation is consistent with our federally compliant business process and 100% QA/QC procedures for federally funded individual assistance programs we administer.
28.2	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings as a whole, including: What is the bidder's remediation process if the income level reported was deemed falsified? Response: All participants will be required to sign an attestation that they have fully disclosed all relevant income information, which includes language that if falsified, program participants will be liable for the expense associated with the investment.
28.3	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings as a whole, including: If using the DOE Rebate Reservation and Tracking API (DOE API), how the bidder will incorporate the API into their systems and the execution of the income verification systems? Response: As the first statewide system of record to fully integrate with the real-time DOE Rebate Reservation and Tracking Application Programming Interface (API) we actively work with the PNNL/DOE team as changes and updates are being rolled out. We have built our system of record, iEnergy, to connect into the PNNL/DOE-developed APIs at various

	points in the life of a project. For example, we will be leveraging the APIs to check addresses for eligibility. While the PNNL/DOE systems also have built-in workflows that can be used for tracking applications and projects through their lifecycle, we will be using iEnergy for those functionalities.				
28.4	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings as a whole, including: If not using the DOE API, what are the systems that will be used to verify income and the experience for the household? Response: Not applicable. Our system of record, iEnergy is integrated with the DOE API for address and income verification.				
II.e. SAVINGS CALCULATIONS					
i. MEASURED PATHWAY					
29	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. Which DOE-approved software will be used? Response: As addressed in a prior Energy Modeling (Auditor Tasks) answer, we utilize the DOE-approved tool (SnuggPro) for Modeled energy savings. As it relates to Measured energy savings, we have utilized RECURVE and AESC. We are reviewing the recently released DOE from January 7, 2025 (Launching a Measured Pathway Home Efficiency Rebates Program (IRA Section 50121)) and will deliver the Measured program pathway in compliance with DOE requirements.				
30	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. If state does not yet know what measured savings methodology they will be using, what does the bidder propose? How will the bidder support the state in gaining DOE approval? Response: <table border="1"> <thead> <tr> <th>Modeled Savings</th><th>Measured Savings</th></tr> </thead> <tbody> <tr> <td> - Requires established baseline - Ease for participants and of savings calculation - Leverages industry accepted savings data - Cost-effective & scalable </td><td> - Requires additional access to data - Costly (data collection, analytics) - Time consuming - Higher accuracy, more precise </td></tr> </tbody> </table> The Egis Team has applied modeled and measured savings calculation models as part of their energy rebate program delivery work. Because there are benefits and potential drawbacks to each model, our team is flexible and can work through the approach NDEE elects to implement. With that said, we recommend a modeled approach for the following reasons: - Producing measured savings for each home adds another layer of cost with additional, extensive engineering data analytics taking away from funds available for the homes/families and small businesses these dollars were intended to benefit	Modeled Savings	Measured Savings	- Requires established baseline - Ease for participants and of savings calculation - Leverages industry accepted savings data - Cost-effective & scalable	- Requires additional access to data - Costly (data collection, analytics) - Time consuming - Higher accuracy, more precise
Modeled Savings	Measured Savings				
- Requires established baseline - Ease for participants and of savings calculation - Leverages industry accepted savings data - Cost-effective & scalable	- Requires additional access to data - Costly (data collection, analytics) - Time consuming - Higher accuracy, more precise				

	• Applying modeled savings increases scalability and allows states to take advantage of established energy savings data that states have already produced in state-specific Technical Reference Manuals (TRM) built with decades of residential utility energy efficiency programs savings data • Modeled savings also allows NDEE to get these programs off the ground quickly and report results faster due to established models for calculating energy savings • Aggregators typically do not want to participate in multifamily efficiency programs due to the complexity associated with tenants moving in and out and other complicating factors. • A measured program prohibits the state of Nebraska from offering all of the 50122 benefits to a participating household until 12 months after they've participated in 50121. • Aggregators are seeking a significant payment for managing the contractors which may make these projects unviable for local contractors. • Nebraska utilities will have difficulty providing the interval data required to support a measured program. • Aggregators typically target households that are moderate or upper-income which may not align with the goals and objectives of the State of Nebraska. • Aggregators typically like geographic density for participating households which could adversely impact the state's ability to maximize participation in rural parts of the state. The modeled approach streamlines the customer experience, reduces risks, and provides for more accurate savings estimates. The energy and utility bill savings estimates are important to get right upfront since they are used in the decision-making process of the homeowner. Our modeled savings approach will apply a rigorous and DOE-compliant methodology when assessing single-family and multi-family residential energy usage. Our engineering and data science teams understand the challenges associated with modeling homes that results in accurate energy and bill savings. We have a proven record of accurately quantifying and verifying savings across the programs we administer across North America. We are currently working with the DOE on developing multiple measured pathway pilots in various states. There are numerous questions and necessary guidance that needs to be provided by the US DOE prior to launching a measured program.
31	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder use the approved M&V methodology to determine weather-normalized energy use before the installation of any upgrades? Response: As addressed in a prior Energy Modeling (Auditor Tasks) answer, we utilize the DOE-approved tool (SnuggPro) for Modeled energy savings – which determines weather-normalized energy use before the installation of any upgrades.
32	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured.

	Describe whether a different methodology will be used for multifamily homes and how it will be different from single-family homes.
	Response: Through our experience running energy programs for decades, a different methodology will be used for multifamily homes/properties. Typically, these properties are master-metered by Utility companies and an ASHREA Level 2 Energy Audit would need to be performed to establish a baseline and model energy savings. Single-family homes would be able to go through the pre-existing modeling that is built into iEnergy and has been approved the DOE.
33	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder verify that at least one major upgraded occurred and that it was an eligible upgrade as part of the HOMES program? Response: Through a rigorous QA/QC process that involves desk reviews an in-person site visits – we will verify one major upgraded occurred and that it was an eligible upgrade as part of the HOMES program.
34	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder ensure that peak seasons have been included in the measurement? Response: As addressed in a prior Energy Modeling (Auditor Tasks) answer, we utilize the DOE-approved tool (SnuggPro) for Modeled energy savings – which requires historical utility bill information to do the analysis and ensures that peak seasons have been included in the measurement/modeling for households.
35	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder estimate energy savings from data collected at the home assessment? Response: We would apply the same approach and methodology as our client Florida (FDACS) who is also utilizing the measured pathway for their HOMES program. Working with IOU's, Municipalities, Cooperatives, and Delivered Fuels companies would be collecting the following energy consumption data at the time of application/intake: • Natural Gas and/or Electric Consumption Data (Pre and Post Projects) • Previous consecutive 12 months • All months since project completion • Utility Rates and Charges the Resident/Owner Pays While working with utilities to obtain energy consumption data appropriate for accurate utility bill impact and savings calculations. If a utility has time-of-use (TOU) rates and/or other consumption-driven demand tariffs, then more granular data than monthly data will

	be requested and used for calculating 'measured savings (kWh)' and peak season demand savings (kW).
36	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. Confirm and describe how all calculations will be done no less than 9 months after installation and how the peak season will be accounted for. Response: As addressed in a prior Energy Modeling (Auditor Tasks) answer, we utilize the DOE-approved tool (SnuggPro) for Modeled energy savings – which requires historical utility bill information to do the analysis and ensures that peak seasons have been included in the measurement/modeling for households. Working with IOU's, Municipalities, Cooperatives, and Delivered Fuels companies would be collecting the following energy consumption data at the time of application/intake: • Natural Gas and/or Electric Consumption Data (Pre and Post Projects) • Previous consecutive 12 months • All months since project completion • Utility Rates and Charges the Resident/Owner Pays While working with utilities to obtain energy consumption data appropriate for accurate utility bill impact and savings calculations. If a utility has time-of-use (TOU) rates and/or other consumption-driven demand tariffs, then more granular data than monthly data will be requested and used for calculating 'measured savings (kWh)' and peak season demand savings (kW).
37	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. If the state is not using the DOE API rebate reservation process, define the process in place to reserve or hold funds so that there are enough funds available 9-12 months after project completion. Response: Given our extensive work with contractors, IRA programs, and stakeholder engagement for multiple states – we would not recommend this approach specific to the measured pathway. Not only does it create complexity, higher administrative costs, rebate uncertainty, but also is likely a non-starter for most mom-and-pop contractors as well as homeowners. Effectively a financial institution must be introduced to handle this float from project completion to rebate payment. This institution would manage program funds so that there are enough funds available 9-12 months after project completion.
38	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. If the state is using the DOE API rebate reservation process, how will the bidder execute and manage the process? Response: The iEnergy workflow engine uses project data elements to drive logic conditions, including funding reservations and project, invoicing, and payment statuses to move them backward and forward or reroute within the workflow. The iEnergy formula, calculation, and validation engines can handle complex calculations, exchange data with

	other NDEE systems (e.g., NISC and other approved systems) via integration, and implement complex workflow and approval logic. The public interface for iEnergy enables consumers and contractors to quickly check status, review invoice and payments details, and submit e-signature approvals. We can incorporate notification emails (including HTML formatting capabilities) throughout the workflow to request actionable activities such as an approval.
39	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How would the bidder potentially measure energy savings across a portfolio of homes? How will the bidder manage all individual home data within a portfolio? How will portfolios be monitored and verified?
	Response: As we are doing for FDACS and their Measured savings program – as well as the California measured savings approach this concept originates from - we utilize RECURVE and AESC for measuring energy savings across a portfolio of homes, managing all individual home data within a portfolio, as well as M&V. It is extremely cumbersome and less cost effective than other delivery models.
40	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder approve and manage aggregators?
	Response: We will run an RFQ to approve and manage aggregators.
41	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder monitor qualified contractors and notify the state when contractors are violating program requirements?
	Response: Our Regional General Contractor (RGC) model will ensure quality installations take place and monitor qualified contractors via a Qualified Contractor Networks (QCN). Through the vetting and management of the RGC + QCN model the Egis Team will promptly notify the state when contractors are violating program requirements.
42	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder ensure that all data is collected and managed as defined in the DOE Data & Tools Requirements Guide?
	Response: Our iEnergy IRA solution has been built out to collect and manage data as defined by the DOE/PNNL requirements.
ii. MODELED PATHWAY	
43	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured.

	Which DOE-approved software will be used?
	Response: As addressed in a prior Energy Modeling (Auditor Tasks) answer, we utilize the DOE-approved tool (SnuggPro) for Modeled energy savings.
44	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder use the modeling software to estimate energy savings based on information collected at final home assessment? Response: As addressed in a prior Energy Modeling (Auditor Tasks) answer, we utilize the DOE-approved tool (SnuggPro) for Modeled energy savings – which requires historical utility bill information to do the analysis and to estimate energy savings based on information collected during the final home assessment.
45	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. Describe whether a different methodology will be used for multifamily homes and how it will be different from single-family. Response: For both modeled and measured pathways, our experience has demonstrated that a different methodology needs to be used for multifamily homes/properties. Typically, these properties are master-metered by Utility companies and an ASHREA Level 2 Energy Audit would need to be performed to establish a baseline and model energy savings. Single-family homes would be able to go through the pre-existing modeling that is built into iEnergy and has been approved the DOE.
46	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder verify that at least one major upgraded occurred and that it was an eligible upgrade as part of the HOMES program? Response: Through a rigorous QA/QC process that involves desk reviews an in-person site visits – we will verify one major upgraded occurred and that it was an eligible upgrade as part of the HOMES program.
47	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured. How will the bidder assess the availability and quality of billing data and determine sufficiency for modeling? Response: We will require customers to provide access to a minimum of monthly billing data for the prior 12-month period. We will coordinate with utilities in the state to include data access consent forms into the initial application process so program may facilitate obtaining utility data directly from utilities.

48	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured.
	How will the bidder address missing data in compliance with DOE methodologies? Response: Projects with missing data critical to savings calculations will be put on hold by using our existing rebate processing system standard procedures and regular QA checks. Participants will be given a window within which time they must submit the missing information. If an applicant has not lived in the household for 12 months then the modeled-path exception process will be employed to allow the applicant to participate in the program.
49	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured.
	How will the bidder use a model to calibrate savings? What model is the bidder proposing to use? Response: We will estimate energy savings based on relevant and approved sources, including Technical Reference Manual(s) (eTRMs) and Database for Energy Efficiency Resources (DEER) workpaper values.
50	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured.
	How will the bidder perform periodic reliability analysis to ensure the reliability of modeled savings? Response: Through a DOE-approved M&V methodology – we will perform periodic reliability analysis to ensure the reliability of modeled savings.
51	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured.
	If the state has been approved for modeled-path exceptions, how will the bidder execute and manage those program paths? Response: Yes, we will collaborate with the state on TBD-approved modeled-path exceptions. These exceptions would follow the allowed protocol described in the BPI 2400 standards and DOE requirements.
52	Bidders should provide information on how they plan to calculate savings for each project. Note, this will vary by the program pathway, modeled or measured.
	How will the bidder ensure that all data is collected and managed as defined in the DOE Data & Tools Requirements Guide? Response: All data collected, managed, and stored as defined in the DOE Data & Tools Requirements Guide Savings will be in our centralized system of record (iEnergy). Furthermore – energy savings will be calculated via the ASHREA Level 2 energy audit for multi-family buildings and SnuggPro for single-family homes. iEnergy was the first

	tracking system to connect to the DOE/PNNL API - which ensures consistent, compliant, and accurate data collection.
II.f. DATA ACCESS	
53	If applicable, bidders should describe their approach for collecting and managing utility energy data for single-family households and aggregate, whole-building data for multifamily buildings, consistent with state policy and the requirements for data access as defined by the state. How will the bidder implement the pre-project data access approach as defined by the state (e.g., Opt-in, Opt-out, Aggregated, Open Access)? If collaborating with utilities to receive data, how will the bidder support the state in collaboration and transfer of data? Response: We are familiar with and deliver programs that have Opt-in, Opt-out, Aggregated, Open Access provisions. If selected we would recommend an Opt-in approach to pre-project data access. Given the amount and quality of Personally Identifiable Information (PII) utility data brokers collect through various means - we recommend Opt-in given most residents, renters, and building owners prefer this option from a data-privacy. Additionally – Utilities & Public Utility Commission are not generally willing to hand over all of this data to facilitate an Opt-out program. During Utility-data access conversations during the Planning / Blueprint development – we would engage with IOU's, Municipalities, Cooperatives, and Delivered Fuels companies. Details would be provided as to how NDEE and our team as the program administrator plans to use these methods safely and securely along with responses to questions from the DOE. The data access approach we will develop with NDEE will be defined our ISO SOC 2 Type II compliant data access, storage, and management policies, including: • Data collection • Data and process workflows, requirements • System integration(s) • Data protection • Data quality metrics • Tracking and reporting
54	If applicable, bidders should describe their approach for collecting and managing utility energy data for single-family households and aggregate, whole-building data for multifamily buildings, consistent with state policy and the requirements for data access as defined by the state. How will the bidder safely and securely manage data consistent with state requirements? Response: As part of the process to establish our pre-project data access approach, we will provide and document the details on how NDEE and our team as the program administrator plan to use data sharing provisions safely and securely. As stated in the previous response, the data access approach we will develop with NDEE will be defined our ISO SOC 2 Type II compliant data access, storage, and management policies, including: • Data collection

	• Data and process workflows, requirements • System integration(s) • Data protection • Data quality metrics • Tracking and reporting
55	If applicable, bidders should describe their approach for collecting and managing utility energy data for single-family households and aggregate, whole-building data for multifamily buildings, consistent with state policy and the requirements for data access as defined by the state. What is the bidder's proposed approach for assessing and communicating with various types of utilities? (e.g., IOUs, Co-ops, municipals) Response: In our role as the statewide administrator we would work with all utilities (i.e., investor-owned, rural cooperative, and municipally owned electric and gas utilities) in Alabama to establish safe data sharing agreements and processes where possible. To enable this, we would build on our existing relationships with Alabama Power Company (APC) and Tennessee Valley Authority (TVA) members to establish a long-term programmatic relationship. Building upon our existing relationships involves multiple meetings with various utility, muni, and cooperative employees across leadership, government affairs, customer programs, and IT/IS teams. The Egis Team will coordinate and collaborate with utilities across Alabama to coordinate marketing, customer program offerings, and potentially co-branding to maximize impact, streamline communication, and leverage pre-existing marketing resources. We understand that each utility serves the unique needs of their customers/members and each of these utility partners will play an integral role in this program's design and implementation. Ideally, our execution of the communication and coordination plan will include: • Leveraging utility companies' existing customer communication practices to enhance program awareness • Gaining a broader understanding of currently operationalized rebate programs • Coordinating program benefits to maximize impact on the population • Developing a business process for utility customer data transfer
56	If applicable, bidders should describe their approach for collecting and managing utility energy data for single-family households and aggregate, whole-building data for multifamily buildings, consistent with state policy and the requirements for data access as defined by the state. What is the bidder's proposed approach for overcoming barriers and obstacles to collecting utility energy data for single-family and multifamily buildings? Response: As we know from our decades of work on utility customer programs and as well through our work with other states and their IRA programs – we have been able to delicately manage and overcome most barriers and obstacles to collecting utility energy data. Through our experience working on these IRA Programs in other states, we have created a thoughtful process to engage the utilities that creates relationships and thoroughly informs and educates these significant stakeholders throughout the design process. We

	have created a Utility Data Access Agreement and work on one on with each utility to ensure a collaborative process for the data gathering and data sharing process. Our experience with other SEOs and proven ability to leverage personal relationships at utilities, and others will help with the long-term success of NDEE's programs.
57	If applicable, bidders should describe their approach for collecting and managing utility energy data for single-family households and aggregate, whole-building data for multifamily buildings, consistent with state policy and the requirements for data access as defined by the state. How will the bidder ensure that consumers participating in the program agree to provide access to their energy usage data as a condition of receiving a rebate? Response: As will be detailed in the Consumer Protection Plan (CPP) during the Blueprint development - resident's or owner's consent will be requested as part of the application process as a stand-alone part of the program terms and conditions and will be required to be eligible to participate in the program. As recommended earlier we would do this through an Opt-in process with the Terms and Conditions stating clearly to potential applicants participating in the program that they would agree to provide access to their energy usage data as a condition of receiving a rebate. Applicant data and signatures are captured as part of the business process in our iEnergy portal. Consumers participating in the program can accept program terms with hand-drawn digital signatures or by simply acknowledging their agreement by clicking a checkbox or selecting "yes" from a dropdown list.
58	If applicable, bidders should describe their approach for collecting and managing utility energy data for single-family households and aggregate, whole-building data for multifamily buildings, consistent with state policy and the requirements for data access as defined by the state. If the bidder will be supporting the state in developing the Data Access Plan, what is the bidder's proposed approach to developing the plan and key content within the plan, and how the above activities will be incorporated into the plan? Response: The Data Access Plan we support will be grounded in risk mitigation, ensuring any personal identifiable information (PII) is maintained safely and securely, and appropriate data protection protocols are established, monitored, and adhered to. With the goal to create a simplified applicant experience by reducing the burden, this plan will foster stronger relationships with utilities to not adversely impact their staffing and operations by betting inundated with phone calls and inquiries. We will coordinate and collaborate with Nebraska's utility companies to maximize impact, streamline communication, leverage marketing resources, and identify high-performing contractors. Our approach will also be grounded in federal compliance and the requirements outlined in the Utility Data Access Guidelines issued by the U.S. DOE. Our utility data access plan has already been approved by the U.S. DOE for IRA integration Key components of the plan will include: • Definition of energy consumption data to be collected and purpose for collection • Consumer consent processes • Data field requirements • Timing of data exchanges

	• SFTP data exchange processes • Data access limits and restrictions • Physical and electronic document storage processes and requirements • Data back-up processes Examples of utility data we can collect and analyze for consumers include: • Customer Data: Account Name, Account Number, Address • Usage Data: Account Number, Meter ID, Date/Time, Energy Unit, Read Code, AMI Data • Other Possible Data (Optional for Added Functionality): Bill Cycle Calendar, Monthly Bill Data, Tariff Data, Load Control Event History, • Load Control Participation, Green Button Data The Utility Data Access Plan outlines how we will use SFTPs to send and receive sensitive customer information, including all documents containing PII. In addition to data exchange, data access policies are another critical component of our Utility Data Access Plan we develop. The plan will detail access restrictions for approved SFTP users to view, upload, or download sensitive information. We will limit access to our team members assigned to a project. Each user's access is limited only to appropriate folders that pertain to their work. The plan will also include policies around safe and secure document storage for physical and electronic documents. Our team stores encrypted data in a secure Cloud environment, encrypts files and drives, and securely backs up data for real-time backup service. Data and documents received via online applications, SFTP, and bulk project data uploads will be securely stored and accessible through administrator portals in iEnergy. We leverage modern infrastructure, monitoring, security tools, and processes to protect sensitive client information. An annual SOC2 Type II audit certifies the expected level of security, tools, and processes are in place. Our software solutions use 256-bit secure socket layer encryption to protect data and documents in transit and storage. Secure, role-based access allows users different security privileges, including project managers, customers, and industry and contractor partners. Audit trails are available at various levels using transaction, user, and system logs. Specific to the iEnergy platform we will use for program data management and processing, our data privacy and information security program and practice focuses on shielding and sharing information appropriately and lawfully while providing confidentiality, integrity, and availability. The iEnergy operations team performs nightly incremental and weekly full data backups. They store data backups onsite and offsite within the continental United States and encrypt data stored offsite via industry-standard AES 256-bit encryption for data at rest. We understand there is a diverse network of utilities across Nebraska. Each of these entities can play an integral role in this program's design and implementation. During the preliminary stages of planning, our outreach and engagement will focus on the following: • Developing a business process for customer data transfer • Leveraging utility companies' existing customer communication • practices to enhance program awareness • Gaining a broader understanding of currently operationalized rebate programs • Coordinating program benefits to maximize impact on the population • Exploring the possibility of leveraging utility dollars with the State's formula allocations
--	---

	Identifying the existing contractor pool
59	If applicable, bidders should describe their approach for collecting and managing utility energy data for single-family households and aggregate, whole-building data for multifamily buildings, consistent with state policy and the requirements for data access as defined by the state. If program participants (i.e., homeowners) are involved in accessing and sharing their utility data, how will the bidder simplify the process to minimize burden? Response: As we've done for utility programs for decades and as well with other states and their IRA programs that have been approved by the DOE – we have a simplified business process that screens applicants and assesses eligibility before a case manager and/or energy assessment is done as to not 'lead on' a potential applicant. This process will be detailed in the Consumer Protection Plan (CPP) and Utility Data Access Plan (UDAP) during the Blueprint development. Resident's or owner's consent will be requested for pre-screening as part of the application process as part of the eligibility determination to participate in the program. Applicant data, Opt-in utility data access request, and signatures are captured as part of the business process in our Applicant portal.
60	If applicable, bidders should describe their approach for collecting and managing utility energy data for single-family households and aggregate, whole-building data for multifamily buildings, consistent with state policy and the requirements for data access as defined by the state. How will the bidder work with the state to identify and apply allowed program requirement exceptions to utility bill collection? Response: Issues will arise over the lifecycle of the program. As an example, if an applicant is in arrears with their utility company they may not be comfortable requesting utility bill information. In some instances, the applicant may be disqualified if they are unable to provide information to do the required modeling of the home during an energy assessment. Exceptions to the business process would need to be detailed and approved by the DOE prior to providing an alternative pathway. Regional EIA data, estimated energy intensity (kWh/sqft, therm/sqft, etc.) data, and deemed savings are some methodologies that could be evaluated for such edge-cases.
II.g. REBATES	
61	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: Is the bidder proposing to use the DOE rebate API? Response: Yes, Our software solution is fully integrated with DOE and PNNL API's.
62	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: What systems will be used for processing and payment?

	Response: These depend on final program considerations. We have developed systems and processes that align with DOE requirements connect with PNNL, and ensure prompt payment to contractors. We will work collaboratively with NDEE and your finance team to develop final processes and procedures that align with typical or approved business processes within the state of Nebraska.
63	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: How will the bidder manage rebates to both customers and contractors?
	Response: The Egis Team will work collaboratively with the state of Nebraska to define processes and procedures for the management and issuance of rebates for customers and contractors. Many states are designing a program targeting lower income households, thus simplifying the process and removing any applicant cost share. The Egis Team has managed fund distribution on billions of dollars in federally funded projects, and more importantly has developed a variety of strategies for these IRA Rebate programs to create a simple, streamlined and compliant process for all program stakeholders.
64	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: How will the bidder manage budgets and ensure that funds have not been over-obligated, particularly for the measured program path?
	Response: As outlined in previous sections of this response, the Egis Team has designed and implemented both modeled and measured programs throughout the US and would strongly discourage the state of Nebraska from implementing a measured program.
65	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: How will the bidder manage payments to contractors or aggregators that were different from the rebate that was provided to the program participant?
	Response: The answer to this question will be informed by final program design. In some states we are handling the issuance of payment to contractors on behalf of program participants. In the event that there is an applicant cost share driven by either energy savings or percentage of AMI, the program will collect payment from the applicant to cover their cost share and issue complete payment to the contractor upon completion of the quality control inspection. This approach simplifies payment processes for the contractor and the applicant and mitigates the risk of applicant not possessing cost-share funds.
66	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: How and when will contractors be paid?
	Response:

	There are a variety of ways in which contractors can be paid based upon numerous program design considerations. As outlined above, numerous states are designing a program where by the Egis Team acts as the fiscal agent on behalf of the state, and payment is issued based upon adherence to the standard operating procedures defined during program design.
67	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: How will the bidder ensure appropriate payments to consumers and contractors consistent with federal and state rebate requirements? Response: The Egis Team has been working hand in hand with the US DOE, numerous state energy offices along with PNNL, and has developed a simplified and compliant process that conforms with all federal requirements and mitigates risks associated with claw back, fraud, waste and abuse.
68	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: How will the bidder ensure the maximum time allowed for rebate processing will be met? Response: The Egis program design facilitates accurate, compliant and timely payment to contractors. We understand that for small contractors, which could be critical to the program's success, timely payment is essential. Final approach to payment processing can be refined through collaboration throughout the program design phase.
69	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: What are the risks to meeting the rebate processing time frame requirements and how will the bidder mitigate those risks? Response: The Egis program design facilitates accurate, compliant and timely payment to contractors. We understand that for small contractors, which could be critical to the program's success, timely payment is essential. Final approach to payment processing can be refined through collaboration throughout the program design phase.
70	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: How will the bidder ensure rebates meet all program requirements and document those conditions? Response: The Egis Team has developed a simplified business process beginning with income qualified eligibility determinations, followed by the conducting of energy audits and appropriate scope development and contractor oversight to facilitate a compliant business process that aligns with industry best practices and DOE requirements.

71	Bidders should describe their approach to how rebates will be paid and processed, including but not limited to: How will procedures differ between single-family homes and multifamily homes/buildings? Response: There are numerous differences between the single family and multifamily business process. A single family owner occupied applicant is the simplest case to administer and our business process outlined in previous questions in this attachment addresses that experience. Various considerations that need to be discussed during program design for multifamily include: • Drafting of a covenant between the state and landlords placing restrictions on rent increases post program participation • Who is best suited to obtain PII from the tenant population • Communication strategies with the tenant population during application and construction • Coordination with contractors to schedule and conduct construction in a manner that mitigates tenant inconvenience This is just a small sampling of the complex nature of multifamily with these IRA Rebate programs. As noted above the Egis Team has been working collaboratively with the US DOE to develop a multifamily strategy for these rebates that may serve as the national model. We would welcome the opportunity to discuss this further with the state of Nebraska.
PART III. PROGRAM IMPLEMENTATION: HOME ELECTRIFICATION AND APPLIANCE REBATES (IRA SECTION 50122) – a. GENERAL DELIVERY APPROACH	
72	Bidders should explain how their proposed program will address: The overall program approach and how the homeowners, multifamily building owners, and tenants will interact with the program (i.e., customer journey). Response: The Egis Team would propose to run these programs concurrently, please see response to Question #7
73	Bidders should explain how their proposed program will address: The structural barriers they expect to incur and how they will overcome these through the program delivery. Response: Having designed and deployed over 750 energy efficiency programs nationwide and most recently helping design and develop 6 state's IRA Rebate programs, The Egis Team provides decades of knowledge and expertise along with unparalleled working with state energy offices and the US DOE on risk analysis and problem solving for these IRA Rebate programs. As outlined in our methodical program design approach, we work collaboratively with our clients to proactively identify risks and other market factors that could adversely impact the success of these programs. Many of these risks and mitigations strategies become KPIs that we monitor throughout the lifecycle of the

	program to endure that we are delivering an efficient, effective and compliant program to the citizens of Nebraska. We are proud of the fact that recent guidance issued by the DOE has been driven by the Egis Team as we identify programmatic challenges associated with agency rulemaking. More specifically the recent guidance on contractor payments on 50121 multifamily building was driven by the Egis Team working with the DOE and HUD working on a multifamily pilot in the state of Indiana.
74	Bidders should explain how their proposed program will address: The bidder's general approach and an overview of innovative ideas for achieving priority program objectives. Response: The attached work plan includes a wide variety of innovative ideas harnessing industry best practices in energy efficiency delivery along with our extensive designing and implementing federally funded housing assistance programs. Our approach, grounded in federal compliance does the following: Simplifies the applicant experience by: • Maximizes categorical eligible • Establishes call center • Fosters partnerships with statewide network of nonprofits and program partners • Executes utility data access agreements to retain consumption data on behalf of applicants Reduces barriers to contractor participation by: • Providing auditors for the program rather than burdening contractors • Creating a simplified invoicing process to decrease administrative burden • Fast tracking invoice processing and payment • Performing income eligibility determinations thus eliminating need for contractors to review PII of applicants. Protects consumers by: • Utilizing auditors as agent of the program vs the contractor • Establishing controls to minimize risk of PII exposure • Providing a SOC II certified System of Record to protect data integrity • Developing a qualified contractor network with appropriate safeguards • Conducting quality control inspections to ensure work performed is up to program standards • Ensuring utility bill savings for participating households A more detailed narrative that describes these concepts can be found in the work plan attached.
75	Bidders should explain how their proposed program will address: The bidder's overall approach to providing point-of-sale rebates. Response: The Egis Team implements POS programs throughout the US on a daily basis, however, we would discourage the state from launching a POS program for 50121 or 50122 for the following reasons:

	<table><tr><th colspan="2">POINT OF SALE</th></tr><tr><td>STRENGTHS ✓ Perceived Ease ✓ Minimal agency impact ✓ Scalability </td><td>WEAKNESSES ✗ High retailer administrative burden ✗ Workforce development ✗ Inconsistent customer perception of 'rebate' based on various AMI factors ✗ Fraud, waste, and abuse ✗ Reporting ✗ State and local tax calculations ✗ Rural/J40 access ✗ Energy savings ✗ Expensive QC/QA </td></tr><tr><th colspan="2">Open Contractor Network</th></tr><tr><td>STRENGTHS ✓ Applicant choice </td><td>WEAKNESSES ✗ Standardization ✗ Confusion ✗ Fraud ✗ Federal compliance and reporting ✗ Number of vendors and contracts the state would need to manage </td></tr><tr><th colspan="2">Closed Contractor Network</th></tr><tr><td>STRENGTHS ✓ Existing federal model ✓ Quality and capacity control ✓ Statewide standardization ✓ Reporting compliance ✓ Ensures bill neutrality or better ✓ Simplifies applicant experience ✓ Delivers synergies with CAAs and utilities ✓ Maximizes impact with blending, braiding and stacking funds ✓ Builds a qualified, certified and competent workforce </td><td>WEAKNESSES ✗ Applicant contractor choice </td></tr></table>	POINT OF SALE		STRENGTHS ✓ Perceived Ease ✓ Minimal agency impact ✓ Scalability	WEAKNESSES ✗ High retailer administrative burden ✗ Workforce development ✗ Inconsistent customer perception of 'rebate' based on various AMI factors ✗ Fraud, waste, and abuse ✗ Reporting ✗ State and local tax calculations ✗ Rural/J40 access ✗ Energy savings ✗ Expensive QC/QA	Open Contractor Network		STRENGTHS ✓ Applicant choice	WEAKNESSES ✗ Standardization ✗ Confusion ✗ Fraud ✗ Federal compliance and reporting ✗ Number of vendors and contracts the state would need to manage	Closed Contractor Network		STRENGTHS ✓ Existing federal model ✓ Quality and capacity control ✓ Statewide standardization ✓ Reporting compliance ✓ Ensures bill neutrality or better ✓ Simplifies applicant experience ✓ Delivers synergies with CAAs and utilities ✓ Maximizes impact with blending, braiding and stacking funds ✓ Builds a qualified, certified and competent workforce	WEAKNESSES ✗ Applicant contractor choice
POINT OF SALE													
STRENGTHS ✓ Perceived Ease ✓ Minimal agency impact ✓ Scalability	WEAKNESSES ✗ High retailer administrative burden ✗ Workforce development ✗ Inconsistent customer perception of 'rebate' based on various AMI factors ✗ Fraud, waste, and abuse ✗ Reporting ✗ State and local tax calculations ✗ Rural/J40 access ✗ Energy savings ✗ Expensive QC/QA												
Open Contractor Network													
STRENGTHS ✓ Applicant choice	WEAKNESSES ✗ Standardization ✗ Confusion ✗ Fraud ✗ Federal compliance and reporting ✗ Number of vendors and contracts the state would need to manage												
Closed Contractor Network													
STRENGTHS ✓ Existing federal model ✓ Quality and capacity control ✓ Statewide standardization ✓ Reporting compliance ✓ Ensures bill neutrality or better ✓ Simplifies applicant experience ✓ Delivers synergies with CAAs and utilities ✓ Maximizes impact with blending, braiding and stacking funds ✓ Builds a qualified, certified and competent workforce	WEAKNESSES ✗ Applicant contractor choice												
III.b. EDUCATION AND OUTREACH													
76	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: Approaches and strategies for educating customers, retailers, contractors, and distributors about home electrification and appliance rebates; how consumers will access information and will be encouraged to participate in the program. Response: We have provided detailed strategies in our Education and Outreach Plan that address each of these stakeholder groups. Fundamentally we believe the most important factor to consider is how the state should educate participating households on anticipated utility bill impacts associated with electrification. Our program design mitigates the likelihood of an increase in household utility bills and provides transparency to participating households to mitigate risk to the state and applicants.												
77	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: How will the bidder promote other federal programs and encourage stacking and braiding with non-federal programs, including other incentives, and financing offerings?												

Response:

The Egis Team provides NDEE with experience in various federal funding sources, which can be braided with these rebate dollars and in breaking down barriers between government agencies to address fundamental program challenges that may impact the program's success. Our funding specialists have designed and managed complex federally funded portfolios and are well-versed in multiple funding sources.

Key Considerations

The 50121 and 50122 programs contain a cost-share gap that, if not closed, creates a significant barrier to program participation, especially within Nebraska's LMI population. This gap equates to a homeowner contribution of 20% of the total benefits afforded, thus requiring the homeowner to front thousands of dollars to receive the program's benefits. Nebraska can combine these rebate dollars with other federally funded utility and state programs to maximize the impact on a household-by-household basis. This decreases administrative costs and maximizes the outcomes for Nebraska homeowners. Additionally, many applicant homes may have pre-existing conditions that preclude their eligibility in the program. These conditions could include leaky roofs, mold, etc., which may not be able to be addressed with program dollars; therefore, alternative funds must be identified to provide "preparedness" resources similar to the U.S. DOE Weatherization program approach.

Our Experience with Braiding Funds

Technical Approach to Maximizing Program Impact

The Egis Team will work collaboratively with NDEE's team to identify appropriate partner agencies and programs to integrate into the overall benefits package for Nebraska residents.

In addition to coordinating with other agencies across Alabama to provide a more efficient and easy rebate process for applicants, our funding SMPs will work collaboratively with NDEE's team to identify funding sources that can be compliantly braided with the rebate dollars to close the cost-share gap, decrease the likelihood of applicant "walk away," and maximize the impact of all funding sources within each household.

Potential Funding Sources could include:

- HAF
- Weatherization Funds
- CDBG Formula Funds
- Unencumbered Rental Assistance Funds
- EECBG
- Grant Funds
- Utility Incentives
- Philanthropic Contributions
- ARP Funds
- IRA Funds
- Nebraska LIHEAP

Coordinated Funding Streams

Complementing program rebates with other funding sources, like weatherization program funds, utility rebates, and financing, can break down cost barriers and make energy-efficient equipment purchases more affordable. We will leverage our national experience to incorporate these other funding sources. New partnerships could also be identified to bring private and public funding sources into the energy efficiency market.

	The Egis Team can create partnerships with market actors to make financing more available and empower them with tools to help them assess the financial viability of projects. Where available, PACE financing could also be leveraged.
78	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: What partnerships and channels will the bidder utilize for outreach? Response: Due to the fact we would encourage NDEE to run the programs concurrently, please see our Education Outreach Plan, Community Benefits Plan and Stakeholder Engagements detailed in our work Plan and in questions above.
79	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: How will the bidder contact and recruit retailers, contractors, and distributors? Response: The Egis Team has developed a multifaceted approach to the identification, development and engagement of a qualified contractor network and distributors for these IRA Rebate programs. This approach includes but is not limited to; • Engagement with Trade Associations & Chambers of Commerce during stakeholder engagement phase • Outreach to Weatherization Contractors and Community Action Agencies • Identification of high performing contractors currently participation in utility efficiency programs • Coordination with various state agencies to identify small and disadvantaged businesses • Establishing a program website to raise awareness and solicit feedback More information can be found in our work plan in the education and outreach section.
80	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: How will the bidder track effectiveness of outreach and education efforts and materials? What metrics does the bidder propose to develop and use to measure effectiveness of education and outreach efforts? Response: As noted in the stakeholder table above, during stakeholder engagement we collect outputs or data points each identified stakeholder group. As outlined in our education and outreach strategy included in our work plan, we work collaboratively with the state to develop a program specific marketing plan grounded in best practices and understanding of the state of Nebraska. Additionally as outlined in our attached program plan, we typically use measurable and trackable marketing strategies, such as digital,

	social and search engine marketing where we can provide real time tracking of the effectiveness of these marketing solutions. By using these types of tactics, we can adjust the plan as needed, based on participation numbers, job workflows etc.
81	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: How will the bidder ensure outreach, education, and marketing efforts are reaching the potential eligible program participants? Response: Our approach as outlined in our education and outreach plan, we identify a variety of tools and tactics to reach the various audiences necessary for successful programming. They include but are not limited to: Contractors, CAA's, Single family households, tenants, landlords, trade associations, along with other interested parties. Further, our tactics are measurable, trackable and reportable and can be geographically targeted to ensure statewide reach for the overall program. Our tactics rely heavily on a digital presence, but based upon the objectives of the Nebraska program, we will work collaboratively on a plan that is appropriate based upon the audiences we intend to target across the state.
82	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: How will the bidder support the state to facilitate at least one public input session and incorporate feedback into program design? Response: We have performed extensive public input sessions in each of the states where we are designing and implementing these IRA Rebate Programs. Although the US DOE only requires a single meeting, we would encourage the state to develop a more robust engagement strategy for a multitude of reasons. We can share our experiences, along with detailed information regarding what some of your other state peers have done to facilitate broad engagement and outreach and help inform program design.
83	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: If applicable, how will the bidder support the state in their development of the Education and Outreach strategy, including their proposed approach to developing the strategy, key content within it, and how the above activities will be incorporated into the strategy? Response: In the attached work plan we have provided a detailed technical approach for the Education and Outreach strategy. This workplan is grounded in industry best practices, along with lessons learned from other states on engagement activities for these IRA

	Rebate Programs. Our approach can serve as a solid foundation and can be refined through thoughtful collaboration with the state of Nebraska.
84	Bidders should provide the following information about how their approach will target and conduct outreach, marketing, and education, including a timeline and budget for associated activities for both trade partners (retailers, contractors, and distributors), consumers, and multifamily building owners: How will the bidder develop tools to help eligible entities identify qualifying households? Response: Our proactive stakeholder engagement, education and outreach and marketing efforts, outlined in our workplan, identify a number of methods and tactics that will identify and target eligible households. These methods have been used in the other IRA Rebate Program states we are managing, as well as the federally funded individual assistance programs the Egis Team has designed and implemented.
III.c. HOME ASSESSMENTS	
85	Bidders should describe when home assessments will be used and the process, including: How will the bidder ensure the limited home assessment process is applied for qualified electrification projects (QEP)? Response: A limited home assessment will be required for all 50122 projects where an electric heat pump is being installed for space heating and cooling. Data collection for the limited home assessment will follow guidelines as provided in the Data and Tool Requirements Guide and will provide customers with both an estimate project cost as well as long term expected savings impacts. When fuel switching is involved the limited home assessment will include a utility bill impact assessment and the results will be presented to the applicant.
86	Bidders should describe when home assessments will be used and the process, including: How will the bidder review and validate home assessments to make sure that they meet all DOE requirements within Section 4.2.4? Response: We begin with setting clear expectations for energy auditors from the outset and reinforcing expectations through regular training. Initially, we will provide a program overview, outline participation requirements and expectations, then reinforce them during our regular interactions. We will also analyze audit and project data and inspection results to identify auditors who may need additional training. Conducting ride-alongs with participating auditors is a key element of our ongoing training. We will accompany program auditors on a higher sampling of projects at the beginning of their program participation to validate that audits are being completed correctly and identifying appropriate opportunities and providing an appropriate level of education to the customer. We will offer feedback on how to improve service delivery and/or suggest adjustments needed to meet program standards.

87	Bidders should describe when home assessments will be used and the process, including:
	The process for and how the bidder will ensure all required information is collected during the home assessment. Response: See response to Question 86.
88	Bidders should describe when home assessments will be used and the process, including:
	The process for and how the bidder will ensure all required information is collected for QEPs that do not require a home assessment. Response: Leveraging our experience previously launching a 50122 program we are well versed in the data collection procedures for QEPs. iEnergy is our end-to-end energy program management platform, offers a centralized data repository to securely collect, store, track, and report on the project, participant, funding, and program data while reducing state administrative and implementation costs.
89	Bidders should describe when home assessments will be used and the process, including:
	Describe how the bidder will alert customers that an electrification project may result in a higher utility bill and develop a threshold for when there is an unacceptable risk of a higher bill. Response: During the energy assessment & modeling, the project scope and estimated energy impacts will be provided to the applicant. If an electrification project/measure may result in a higher utility bill impact is identified – that (and alternative options) would be provided to the applicant. Given our work running energy efficiency and electrification projects we have a list of high->low risk measures for NDEE to review during the Planning process that identifies which household types and equipment may create situations with an unacceptable risk of a higher bill. Some of our SEO clients have chosen not to offer certain measures because of this exact issue.
90	Bidders should describe when home assessments will be used and the process, including:
	How will the bidder review and validate home assessments for accuracy? Response: Please refer to our response to Question 86 for details on our comprehensive and continuous quality management plan.
III.d. ELIGIBILITY AND INCOME VERIFICATION	
91	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings, including:

	How will the bidder determine which upgrades and equipment are included in the qualified product list for the program and the process to update qualified products? Response: The final qualified product list will be developed during the program design phase and be compliant with DOE guidelines. Some states are launching single measure programs and expanding benefit offerings in later stages of the program lifecycle. We can work collaboratively to develop a strategy with NDEE that aligns with your goals and objectives. Further, the Egis Team has had discussions with US DOE and we expect some additional guidance to be issued in Q1 2025 that may change programmatic requirements and afford states greater flexibility. We will continue to work with our DOE partners and ensure any DOE rule changes are quickly integrated into a state's program.
92	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings, including: How will the bidder ensure that the Energy Star certification requirement, if applicable, for heating, cooling, and water heating products is adhered to? Response: The Egis Team has developed quality control/inspection standards along with reporting requirements to mitigate the risk of ineligible products being installed. Our procedures related to project scoping, contractor oversight and invoicing provide the state of Nebraska the appropriate safeguards to mitigate this risk.
93.1	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings, including: Income verification: How will the bidder verify the income levels of applicants and multifamily buildings? Response: The Egis Team has developed a MF strategy that for early stages of the program primarily focuses on Public Housing Authority (PHA) and LITEC properties. This housing stock meets the categorically eligible requirements thus streamlining the eligibility determination process and reducing administrative expenses. As states expand their offerings to open market landlords, it will be imperative to consider the most efficient and effective way to collect PII and reduce data breach risks. Our approach based upon extensive contractor and MF building owner outreach requires the Egis Team and our case managers to collect income qualifying documentation and other PII to streamline and simplify the business process and mitigate various risks.
93.2	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings, including: Income verification: What methods will the bidder implement to randomly sample applicants to confirm income level (especially if for self-attestation)? Response: The Egis Team believes that a compliant program should institute programmatic safeguards that exceed random sampling to validate income verification. The OIG

	guidance has articulated deep concern about self-attestation, and the Egis Team has developed a cost-effective and efficient solution that aligns with said guidance.
93.3	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings, including: Income verification: What is the bidder's remediation process if the income level reported was deemed falsified? Response: The Egis Team has extensive experience designing, implementing and monitoring federally funded income qualified programs. Our practices and procedures mitigate these risks and establish clear and compliant business processes and documentation requirements to reduce the likelihood of fraud, waste, abuse and claw back.
93.4	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings, including: Income verification: If using the DOE Rebate Reservation and Tracking application programming interface (DOE API), how the bidder will incorporate the API into their systems and the execution of the income verification systems? Response: Our software solution connects with the appropriate API's set forth by the US DOE. However, our business process requires case managers that are part of our program staff to collect and review income documentation to substantiate program eligibility.
93.5	Bidders should describe their approach to eligibility and income verification for both single-family households and multifamily buildings, including: Income verification: If not using the DOE API, describe the systems that will be used to verify income and describe the experience for the household. Response: Egis case managers work with program applicants to methodically complete program applications for both 50121 and 50122.
III.e. REBATES	
94.1	Bidders should describe the following: Provide details on the point-of-sale rebate approach, including: What is the process for ensuring that the appropriate rebate is paid based on product and income level? Response: For reasons provided in previous responses, we would strongly discourage the state of Nebraska from using a Point of Sale approach.
94.2	Bidders should describe the following: Provide details on the point-of-sale rebate approach, including: How will the bidder ensure that eligible recipients will receive their rebate at the point of sale?

	Response: For reasons provided in previous responses, we would strongly discourage the state of Nebraska from using a Point of Sale approach.
094.3	Bidders should describe the following: Provide details on the point-of-sale rebate approach, including: How will the bidder ensure that total household rebate limits are not exceeded?
	Response: For reasons provided in previous responses, we would strongly discourage the state of Nebraska from using a Point of Sale approach.
95	Bidders should describe the following: How will eligible entities be paid installation incentives in a timely fashion?
	Response: The Egis Team has developed a scope of work, contractual framework and payment processes which provide EER payment within 14 days of a completed project. It is important to note that each state is approaching EER relationships differently and we can work collaboratively with the state to identify a standardized approach.
96	Bidders should describe the following: What is the process for rebate reimbursement and how will the bidder ensure the maximum time allowed for rebate reimbursement will be met?
	Response: The Egis program design facilitates accurate, compliant and timely payment to contractors. We understand that for small contractors, which could be critical to the program's success, timely payment is essential. Final approach to payment processing can be refined through collaboration throughout the program design phase.
97	Bidders should describe the following: What are the risks to meeting the rebate processing timeframe requirements and how will the bidder mitigate those risks?
	Response: The Egis program design facilitates accurate, compliant and timely payment to contractors. We understand that for small contractors, which could be critical to the program's success, timely payment is essential. Final approach to payment processing can be refined through collaboration throughout the program design phase.
98	Bidders should describe the following: What systems will be used for processing rebates?
	Response: iEnergy, our software system that has been customized for these IRA Rebate Programs provides the state with an end to end solution applicant eligibility, conducting of energy audits, scope development, rebate reservation and delivery, payment processing and DOE programmatic reporting. We are happy to provide a demonstration of this software solution that is currently being successfully deployed on multiple IRA Rebate programs.

99	Bidders should describe the following: How will the bidder work with retailers, distributors, contractors, and other eligible entities to provide rebates?
	Response: As outlined in our education and outreach and community benefits plans, we provide the state of Nebraska with a localized solution grounded in best practices successfully applied in multiple states on these IRA programs. Further, the Egis Team designs and implements utility efficiency programs throughout the US and has proven practices and procedures for successfully collaborating and communicating with the stakeholders outlined in these plans.
100	Bidders should describe the following: How will the bidder manage receiving requests from and providing rebates to customers, contractors, distributors, and retailers?
	Response: Our business process clearly outlined in our work plan simplifies and streamlines the entire applicant experience.
101	Bidders should describe the following: How will the bidder ensure rebates meet all program requirements and document those conditions?
	Response: The Egis approach examines each step in the business process for risks related to compliance, and best positions the state of Nebraska to mitigate risks associated with fraud or non-compliant benefit offerings.
102	Bidders should describe the following: How will the bidder ensure that the household did not receive federal funds for the same equipment or upgrade?
	Response: Our software system, along with our business process and PNNL API integration eliminates this risk and provides NDEE with the appropriate program controls to best position the state for success.
103	Bidders should describe the following: How will the bidder set up multiple pathways to provide rebates either through point of sale or submitted invoice?
	Response: As outlined in our work plan we have identified numerous pathways, in addition to those outlined in the question above. One deliverable of the program planning process is to finalize pathways afforded to applicants through these programs.
104	Bidders should describe the following: How will procedures differ for multifamily homes/buildings?
	Response:

	Communication, application process, eligibility determination, Level II vs BPI Auditing, and many other factors complicate the MF business process. We have developed detailed strategies that we can share for each of these items, but the final approach is predicated on various program design considerations along with which benefits the state intends to offer. It is not possible to answer this question completely prior to program design.
PART IV. PROGRAM IMPLEMENTATION: BLUEPRINTS AND REPORTING	
a. CONSUMER PROTECTION AND QUALITY ASSURANCE	
105	Bidders should describe how they will assure quality installations including: How will the bidder support the state in developing a Consumer Protection Plan, or if already developed, how will the bidder develop the program consistent with the Consumer Protection Plan? Response: The Egis Team is proud that the US DOE is currently using our Consumer Protection Plan developed for another state, as the national model for energy offices to replicate. This plan not only identifies risks, but also programmatic controls and quality control measures for all aspects of the applicant experience to protect consumers.
106	Bidders should describe how they will assure quality installations including: How will the bidder develop a system to collect and respond to consumer feedback? Response: Consumer engagement is initiated during the program design phase to align the program strategy with constituent needs. As outlined in our education and outreach plan, we utilize various tactics to collect key data points which inform program design. Further, our program website affords your constituents the ability to provide feedback throughout the life cycle of the program, and is coupled with customer satisfaction surveys that are provided to each program participant. These surveys collect KPI's that guide programmatic improvement throughout the lifecycle of this initiative.
107	Bidders should describe how they will assure quality installations including: How will the bidder address dispute resolution? What is the bidder's proposed approach for conflict resolution and remediation? Response: Having successfully completed more than \$5 billion in federally funded home repair projects in recent years, the Egis Team provides proven strategies and tactics to ensure quality installation, and in the event of an applicant dispute, appropriate resolution procedures to protect consumers and quickly remedy conflicts are put in place. Further, our business process for these programs, along with our quality control inspection guidelines significantly mitigate the risks associated with applicant dissatisfaction.
108	Bidders should describe how they will assure quality installations including: What is the bidder's proposed approach for onsite inspections to meet DOE requirements?

	Response: The Egis Team believes that one of the largest risks to state energy offices relates to insufficient quality control and oversight of contractor activities. Applicants that experience poor performance will dissuade other from participating in the program, and can adversely impact the overall success of this initiative. Our business process and work plan encourages states to exceed the quality control/onsite inspection standards set forth the DOE to mitigate this program risk.
109	Bidders should describe how they will assure quality installations including: How will the bidder qualify retailers, contractors, and distributors as eligible, identifying required qualifications and have a process for delisting if necessary?
	Response: The Egis Team has successfully developed and received approval from the US DOE process and procedures for the development of a qualified network of program participants. Our approach is grounded in compliance with DOE requirements consumer protection, and extensive outreach with stakeholder groups mentioned above and in our work plan. Final strategies should be a collaborative process between the Egis Team and NDEE.
110	Bidders should describe how they will assure quality installations including: How will the bidder develop installation standards and a process to enforce those standards?
	Response: As noted in previous responses, we provide extensive experience in home repair and rebate work. We have already developed checklists approved by DOE that enforce the standards and protect the state of Nebraska.
111	Bidders should describe how they will assure quality installations including: How will the bidder incorporate continuous improvement, developing processes for identifying problem areas and fraud/waste?
	Response: As outlined in our work plan we have identified a multitude of KPI's for each step on program life cycle that are closely monitored to facilitate the proactive identification of areas for programmatic improvement. We work collaboratively with clients to create a final list of KPI's to track, along with performance standards. We will establish reoccurring meetings with the state to monitor, track and collaborate on these KPI's and develop strategies for modification if the standards are not being achieved.
112	Bidders should describe how they will assure quality installations including: How will the bidder work with a third-party to develop systems for providing households and multifamily building owners with a Post-Installation Certificate after quality assurance has taken place on their upgrade?
	Response: The Egis Team provides extensive experience in the development of processes and procedures related to this item. Final strategy will be defined by the identification of the third party and delineation of scope and responsibilities between each entity.

IV.b.. COMMUNITY BENEFITS	
113.1	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Community and Labor: How will the bidder engage with community partners and community organizations?
	Response: The Egis Team has developed these Community Benefit Plans for each of the state's we are designing and implementing the IRA Rebate Programs. We will employ strategies that engage a diverse selection of community partners ranging from statewide organizations such as Community Action of Nebraska to local civic organizations such as We have proactively identified a wide variety of stakeholders that will inform a thoughtful and impactful program. This work plan clearly articulates strategies along with methods, tactics and key data points to comply with DOE requirements and better inform program design decisioning.
113.2	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Community and Labor: What are the bidder's community outreach and engagement strategies?
	Response: The Egis Team provides a thoughtful statewide approach to outreach and engagement through both planning, design and program implementation. As outlined in the work plan we have proactively identified numerous stakeholders across the state of Nebraska that will be essential to the program design process. We will work collaboratively with the SEO to develop a final plan and stakeholder list to ensure comprehensive engagement is achieved.
114.1	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Skilled and Qualified Workforce: How will the bidder incorporate workforce education and training into their plans for both the single-family and multifamily workforce?
	Response: The Egis Team will work with state's 6 Community Colleges, including Western Nebraska Community College who offers education in various energy technologies, as well as the 13 Universities and colleges, in addition to any additional workforce development and training partners identified, such as the Nebraska Department of Labor. A list of these entities are identified in our workplan.
114.2	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Skilled and Qualified Workforce: How will the bidder support groups that organize and apply collective bargaining?

	Response: The Egis Team has experience developing a network of qualified, competent, certified and capable contractors to participate in this program. We will engage local labor unions to Identify local labor gaps, training strategies and interest In program participation. Some of the various labor and building organizations are included below: • Associated General Contractors (Nebraska Chapter) • Nebraska Builders and Contractors Association • Nebraska State Homebuilders Association We have successfully incorporated and partnered with organizing entities In other IRA Rebate states and will extend those relationships into the Nebraska Program. Developing additional workforce will be critical to the successful roll-out and will ensure delivery to all areas of Nebraska. Working through these and other workforce training institutions will facilitate the necessary capacity to execute these programs statewide.
115.1	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Incorporating Diversity Equity Inclusion and Accessibility (DEIA): How will the bidder incorporate the state’s DEI objectives? How will the objectives be met?
	Response: The Egis team is well-positioned to drive diversity, equity, inclusion and accessibility through our initial community engagement, thoughtful program design and creative contracting strategies. Through innovative programs like our mentor-protégé program, which partners small and minority businesses with larger operations. Further, our team has proactively identified a multitude of barriers that could adversely impact small, minority and disadvantaged business participation our mitigation strategies to these risks afford maximum participation for interested contractors and individuals. Additionally, it is important to note we perform energy efficiency contractor training throughout the US, which is often necessary to familiarize small and disadvantaged contractors with the technology and measures that may be installed through these programs.
115.2	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Incorporating Diversity Equity Inclusion and Accessibility (DEIA): How will the bidder manage and track the portion of budget with minority owned businesses, women owned businesses, and veteran owned businesses?
	Response: Our closed contractor model affords the state ease and simplicity in the engagement of M/W/VBEs and facilitates the issuance of work orders to these contractors that align with their skillset, expertise, capacity and service area. Our system tracks the performance of and funds distributed to each vendor participating in the program.
115.3	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Incorporating Diversity Equity Inclusion and Accessibility (DEIA): What other DEI actions does the bidder propose?
	Response:

	In addition to the strategies outline above, we are currently planning for the launch of geographically focused job fairs, which will match un/underemployed individuals that live in disadvantaged communities with contractors that are seeking to serve those areas.
116.1	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Address Justice40 Initiative: How will the bidder effectively identify and promote home energy rebates to disadvantaged communities? Response: Our earned and paid media strategies have been successfully deployed on other federally funded and energy efficiency programs. Our earned media focuses on pilot projects, identification of trusted community leaders that can serve as program ambassadors to raise awareness, foster trust and drive program participation. Our paid media is a cost-effective mix of social, digital and search, where we can tailor the message and geographic target to ensure the message resonates with the targeted audience.
116.2	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Address Justice40 Initiative: How will the bidder work with the state to ensure that low-income and multi-family funding percentage minimums are met? Response: As outlined in the previous section, our marketing strategies ensure awareness and participation within these communities. Further, our multifamily strategy, outlined in our work plan, specifically focuses on low income mf properties within J40 communities.
116.3	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Address Justice40 Initiative: What are the quantifiable expected benefits expected to accrue to disadvantaged communities? Response: Our approach provides a multitude of benefits to DA communities which include but are not limited to the following: • Job and contracting opportunities • Lower utility bills • Enhanced home comfort • Strengthened partnerships with nonprofits and other EER's in DA communities • Potential braiding with complementary programs planned or offered in these communities
117	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Direct benefits from energy upgrade projects? Response: Our approach offers the following benefits that include but are not limited to: • Lower utility bills

	• Reduced consumption • Enhanced comfort in home • Upgraded equipment
118	Bidders should describe their approach for supporting the state in the development of the Community Benefits Plan which should include: Economic benefits through jobs and contracts? Response: As outlined in previous section the Egis Team has developed various strategies to maximize contracting and job placement opportunities for entities and individuals that fall under the disadvantaged, minority and women designation.
IV.c.DATA AND SECURITY REQUIREMENTS	
119	Bidders should describe their approach to data tracking and data security, including: A description of cybersecurity protocols and how information will be stored securely. Response: Physical and Cyber Security. iEnergy is a SOC 2 compliant platform. We use the Amazon Web Services (AWS) public cloud infrastructure for hosting. AWS is also a SOC 2 compliant subservice organization that provides 24/7 coverage to the hosting environment. Resource Innovations uses AWS data centers and availability zones within the United States. Resource Innovations also maintains a Security Incident Response Plan to respond to cybersecurity and other security incidents. They have an incident reporting email for reporting security incidents. Their internal policy requires employees to report any information related to a security incident to IT, which organizes an investigation and convenes a security incident response team if necessary. Secure Data Storage. Resource Innovations stores encrypted data in a secure Cloud environment. They encrypt both files and drives and securely back up data for real-time backup service.
120	Bidders should describe their approach to data tracking and data security, including: A description of risk-based security controls. Response: Resource Innovations maintains stringent data privacy and information security practices to protect all participant data and information. Their data security policies and protocols align with industry best practices to securely handle and store participant-specific data. In addition to internal policies and established controls, Resource Innovations works with their clients to securely handle and store participant information in accordance with the applicable contract requirements. To exercise data protection, Resource Innovations is committed to: • Restrict and monitor access to sensitive data that is stored on all Resource Innovations systems, software applications, or business collaboration sites • Train employees in online privacy and security measures • Establish clear procedures for reporting privacy breaches or data misuse

	- Establish data protection practices (document shredding, data encryption, backups, access authorization, etc.) - Classifying data based on its criticality to Resource Innovations, clients, and partners and following the Data Classification schema outlined in the Resource Innovations Data Classification Policy To provide security in the transfer of sensitive information, Resource Innovations uses SFTP for sending and receiving all sensitive participant information including all documents containing personally identifiable information (PII). Only approved users can access the SFTP to view, upload, or download sensitive information. Access is limited to staff specifically assigned to a project, and each user's access is limited only to appropriate folders that pertain to their work. Safe and secure document storage for both physical and electronic documents is another important aspect of participant data management. Resource Innovations stores encrypted data in a secure Cloud environment. They encrypt both files and drives and securely back up data for real-time backup service. Data and documents received via online applications, SFTP, and bulk project data uploads will be securely stored and accessible through administrator portals in our program management platform. Resource Innovations leverages modern infrastructure, monitoring, security tools, and processes to protect sensitive client information. An annual SOC2 Type II audit certifies the expected level of security, tools, and processes in place. Their software solutions use 256-bit secure socket layer (SSL) encryption to protect data and documents in transit and in storage. Secure, role-based access allows different security privileges for users including project managers, participants, industry partners, and contractor partners. Audit trails are available at various levels using transaction, user, and system logs. Specific to the iEnergy platform that Resource Innovations will use for program data management and processing, Resource Innovations has a data privacy and information security program and practices that focus on shielding and sharing information appropriately and lawfully, while providing confidentiality, integrity, and availability. iEnergy is a cloud-based SaaS solution that uses industry-standard authentication and authorization mechanisms. The system's security framework provides granular authentication and authorization, including access levels to the screens, data, and actions. All users access iEnergy using common web browsers (e.g., Google Chrome, Firefox, Internet Explorer, and Microsoft Edge) with no additional hardware needed. All users must have a valid user ID and password with associated roles and entitlements that determine level of access.
121	Bidders should describe their approach to data tracking and data security, including: Confirmation that the security and privacy controls should be reviewed by an independent party in the last 3 years. Response: Confirmed. iEnergy undergoes an annual Statement on Standards for Attestation Engagements No. 16 (SSAE16) System and Organization Controls (SOC) II audit by an independent third party. The iEnergy SSAE16 covers the design and operating effectiveness of iEnergy's controls related to security, confidentiality, and availability. Resource Innovations has successfully completed SSAE16 within the past year.
122	Bidders should describe their approach to data tracking and data security, including:

	How will the bidder meet the data collection requirements in the DOE Data & Tools Requirements Guide? Response: iEnergy was the first tracking systems to integration with the DOE/PNNL real-time API back in Aug. 2024. Our team has been working with the DOE Data and Tools Requirements Guide since the early drafting stages. We have also been working with DOE/PNNL on their API protocol for months prior to launching one of the first statewide programs back in Aug. 2024. This will fast track our ability to launch a compliant iEnergy solution quickly for ADECA. We are currently configuring our platform to meet the changing requirements for the HOMES 50121 and HEAR 50122 programs in several stages, including Florida, Arizona, Indiana, Pennsylvania, and Ohio. Specifically, iEnergy meets several DOE data platform requirements: • Single system of record for rebate analysis to facilitate trend reporting to data organization for submission to DOE and ability to perform audits as necessary • Methods for self-attestation of income verification • Software-driven rebate application intake and tracking, categorical income validation, rebate disbursement, and reporting • Processes for rebate assignability, carve-outs, and hold • External-facing website functionality for a simplified, streamlined rebate application • Pathways for braiding funding to emphasize comprehensive decarbonization within existing weatherization and residential rehabilitation channels for low-to-moderate customers • Workflows that enable rapid funding distribution and timing while ensuring accurate energy savings Embedded DOE-approved BPI-2400 energy auditing solution for single-family homes, ASHRAE Level 2 energy audits for multifamily homes is also being done in our iEnergy tool for other SEOs.
123.1	Bidders should describe their approach to data tracking and data security, including: Will the bidder use the DOE/PNNL rebate reservation and tracking API or another system? If using DOE/PNNL, how will the bidder incorporate these workflows and API into the program? Response: iEnergy was the first tracking system to integrate with the DOE/PNNL real-time API in Aug. 2024. As the first statewide system of record to fully integrate with the real-time DOE Rebate Reservation and Tracking Application Programming Interface (API), we actively work with the PNNL/DOE team as changes and updates are being rolled out. We have built our system of record, iEnergy, to connect into the PNNL/DOE-developed APIs at various points in the life of a project. For example, we will be leveraging the APIs to check addresses for eligibility. While the PNNL/DOE systems also have built-in workflows that can be used for tracking applications and projects through their lifecycle, we will be using iEnergy for those functionalities.
123.2	Bidders should describe their approach to data tracking and data security, including:

	Will the bidder use the DOE/PNNL rebate reservation and tracking API or another system? If using a different system, what is the system and how will the bidder ensure the system meets all DOE data and program requirements? Response: We have built our system of record, iEnergy, to connect into the PNNL/DOE-developed APIs at various points in the life of a project. For example, we will be leveraging the APIs to check addresses for eligibility. While the PNNL/DOE systems also have built-in workflows that can be used for tracking applications and projects through their lifecycle, we will be using iEnergy for those functionalities. Specifically, iEnergy's workflow engine uses project data elements to drive logic conditions, including funding reservations and project, invoicing, and payment statuses to move them backward and forward or reroute within the workflow. The iEnergy formula, calculation, and validation engines can handle complex calculations, exchange data with other ADECA systems (e.g., NISC and other approved systems) via integration, and implement complex workflow and approval logic. The public interface for iEnergy enables consumers and contractors to quickly check status, review invoice and payments details, and submit e-signature approvals. We can incorporate notification emails (including HTML formatting capabilities) throughout the workflow to request actionable activities such as an approval. Please refer to our responses to previous questions and our work plan for how our system already complies with DOE data and program requirements.
124	Bidders should describe their approach to data tracking and data security, including: Will the bidder use the DOE/PNNL rebate reservation and tracking API or another system? Does the bidder have data transfer abilities and protocols in place to utilize APIs and HPXML? Response: Yes, our solution (iEnergy) utilizes the DOE/PNNL rebate reservation and tracking API; furthermore our workflows are much more streamlined. As discussed earlier in our work with a variety of other states – we are fully integrated with the DOE/PNNL API and extremely familiar with the address verification, rebate reservation, rebate payment processing functionality. Yes, we have (and can demonstrate) data transfer abilities, documentation, and protocols in place that utilize APIs and meet HPXML requirements.
IV.d. PROGRAM EVALUATION	
125	Bidders should describe how they will store and make available the following data and information: Auditing tools and software Response: Data will be stored in SnuggPro + iEnergy for modeled single-family projects.

	Data will be stored in iEnergy and backed up to a MSFT SFTP/SharePoint site for modeled multi-family projects. To ensure data is available for program evaluation, we will compile and report to the DOE the required data per the Data & Tools Requirement Guide.
126	Bidders should describe how they will store and make available the following data and information: Home assessment data Response: Data will be stored in SnuggPro + iEnergy for modeled single-family projects. Data will be stored in iEnergy and backed up to a MSFT SFTP/SharePoint site for modeled multi-family projects. To ensure data is available for program evaluation, we will compile and report to the DOE the required data per the Data & Tools Requirement Guide.
127	Bidders should describe how they will store and make available the following data and information: Income amounts Response: Income amounts are stored within iEnergy. To ensure data is available for program evaluation, we will compile and report to the DOE the required data per the Data & Tools Requirement Guide.
128	Bidders should describe how they will store and make available the following data and information: Post-installation photos Response: Post-installation photos are stored in FTQ and iEnergy. To ensure data is available for program evaluation, we will compile and report to the DOE the required data per the Data & Tools Requirement Guide.
129	Bidders should describe how they will store and make available the following data and information: Savings assessments from modeled or measured savings approach Response: Data will be stored in SnuggPro + iEnergy for modeled single-family projects. Data will be stored in iEnergy and backed up to a MSFT SFTP/SharePoint site for modeled multi-family projects. To ensure data is available for program evaluation, we will compile and report to the DOE the required data per the Data & Tools Requirement Guide.
130	Bidders should describe how they will store and make available the following data and information:

	Incentives paid Response: Incentive payment data are stored within iEnergy. To ensure data is available for program evaluation, we will compile and report to the DOE the required data per the Data & Tools Requirement Guide.
131	Bidders should describe how they will store and make available the following data and information: Project costs Response: Data will be stored in SnuggPro + iEnergy for modeled single-family projects. Data will be stored in iEnergy and backed up to a MSFT SFTP/SharePoint site for modeled multi-family projects. To ensure data is available for program evaluation, we will compile and report to the DOE the required data per the Data & Tools Requirement Guide.
132	Bidders should describe how they will store and make available the following data and information: Quality assurance tracking and resolution Response: Quality assurance activities are stored in FTQ and iEnergy. To ensure data is available for program evaluation, we will compile and report to the DOE the required data per the Data & Tools Requirement Guide.
IV.e. MARKET TRANSFORMATION	
133	Bidders should describe the following: A general approach to developing market transformation plans and why they are qualified to support the state in developing the Plan. Response: As part of starting up innovative market transformation efforts in California as the Statewide Market Transformation Administrator, as well as for the North American Gas Heat Pump Collaborative and with NEEA, Resource Innovations was responsible for developing detailed implementation plans and putting solid infrastructure and processes in place to ensure responsible spending of funds and that they ultimately achieve stakeholder goals and objectives. Developing a Market Transformation Plan for the Home Efficiency Rebates and the Home Electrification and Appliance Rebates programs sets NDEE up to achieve energy savings over the long term and across Nebraska using market transformation principles and framework, while also supporting the IRA's workforce development, clean energy, and equity objectives. Leveraging the templates and tools we already have in place, we will develop and finalize a Market Transformation Plan in partnership with NDEE within the first year after receiving the financial assistance award.

134	Bidders should describe the following: Key components of a Market Transformation Plan and how the bidder will guide the state through addressing each of them. Response: ✓ Definition of product market and technologies ✓ End-state transformation goal(s) ✓ Baseline definitions ✓ Savings estimations with clear definitions on savings per unit, calculation processes, and data collection Evaluation plan with clear data and realistic data requirements, market progress indicators, and approach Logic Model with clear market intervention and leverage points.
135	Bidders should describe the following: How will the bidder ensure that the Market Transformation Plan meets DOE Program Requirements? Response: We have already submitted Blueprints and had them approved for other states. We will use the same templates for NDEE to ensure compliance with DOE Program requirements.
136	Bidders should describe the following: How will the Market Transformation Plan be implemented, tracked, measured, and reported on towards goals over time? Response: Leveraging our team's experience priming markets for MT and successfully achieving transformation goals, we will work throughout the program implementation period to establish the infrastructure required for the programs to have lasting impacts beyond rebate offers. As part of the Market Transformation Plan, we will define the key market indicators we will track and the approach to data collection. The plan will include proposed data collection and analysis activities to: • Estimate the market baseline • Track total market adoption • Assess market progress and the theory of market change per our MT logic model • Assess causality and incremental impact Please refer to our response to Question 137 for details on tracking, measuring, and reporting key market indicators.
137	Bidders should describe the following: Key market indicators that can quantify and measure market transformation goals and how that data will be collected. Response: Example market indicators we will track include:

	• Total annual incremental energy savings (GWh) • Annual demand reduction (MW) • Market diffusion incremental impact Our approach to defining key market indicators and collecting data needed to track and affirm market transformation is based on decades of MT leadership with organizations like NEEA and the California statewide MT Administrator. Through this work, we know there can be a tendency to judge market progress based on units of adoption – a key measure of MT. However, that metric can be a misleading indicator of success for MT in their early years. Market share and adoption increase slowly and accelerate only after critical market barriers, such as product availability, quality and standardization, workforce capacity, and installer and customer perceptions, are addressed. To appropriately evaluate market progress, it is critical that the final evaluation plan include short- and medium-term market progress indicators that align with the refined logic model. During the long-term monitoring and tracking and transition stages, EM&V activities will focus on ongoing market tracking to ensure sustained market progress.
IV.f.. REPORTING TO STATE AND DOE	
138	Bidders should describe how they will track and report the following to the state while keeping each IRA provision tracked and managed separately, if applicable: Quarterly progress Response: The Egis Team provides extensive experience assisting clients in the preparation and submission of quarterly reports on federally funded initiatives. We develop tracking procedures that are grounded in client identified KPI's, along with DOE requirements to streamline and simplify the reporting process and reduce administrative burden to the state. Further, we understand that the DOE will likely change reporting requirements at various intervals throughout the program lifecycle. The Egis Team closely monitors said guidance and can rapidly adjust to accommodate any federal modifications.
139	Bidders should describe how they will track and report the following to the state while keeping each IRA provision tracked and managed separately, if applicable: Quarterly budget vs. actual spending Response: Our software system, specifically tailored for these IRA Rebate Programs, addresses the deliverables throughout the lifecycle of the program, including the items questioned in Section IV. F. State & DOE Reporting. We would welcome an opportunity to demonstrate our system, iEnergy, to the NDEE team.
140	Bidders should describe how they will track and report the following to the state while keeping each IRA provision tracked and managed separately, if applicable: Projected progress Response: Our software system, specifically tailored for these IRA Rebate Programs, addresses the deliverables throughout the lifecycle of the program, including the items questioned in Section IV. F. State & DOE Reporting. We would welcome an opportunity to demonstrate our system, iEnergy, to the NDEE team.

141	Bidders should describe how they will track and report the following to the state while keeping each IRA provision tracked and managed separately, if applicable:
	Projected budget changes; if any Response: Our software system, specifically tailored for these IRA Rebate Programs, addresses the deliverables throughout the lifecycle of the program, including the items questioned in Section IV. F. State & DOE Reporting. We would welcome an opportunity to demonstrate our system, iEnergy, to the NDEE team.
142	Bidders should describe how they will track and report the following to the state while keeping each IRA provision tracked and managed separately, if applicable:
	Projected scope changes; if any Response: Our software system, specifically tailored for these IRA Rebate Programs, addresses the deliverables throughout the lifecycle of the program, including the items questioned in Section IV. F. State & DOE Reporting. We would welcome an opportunity to demonstrate our system, iEnergy, to the NDEE team.
143	Bidders should describe how they will track and report the following to the state while keeping each IRA provision tracked and managed separately, if applicable:
	Potential risks or realized issues on the project. Response: Our software system, specifically tailored for these IRA Rebate Programs, addresses the deliverables throughout the lifecycle of the program, including the items questioned in Section IV. F. State & DOE Reporting. We would welcome an opportunity to demonstrate our system, iEnergy, to the NDEE team.

120003 O5
Cost Sheet - Pricing Schedule

Home Energy Rebate Programs Applications and Implementation

Bidder Name: Egis BLN Consulting USA, LLC

Instructions: Bidders shall populate the "Deliverables/Tasks" column to include deliverables/tasks involved in achieving the milestone listed in the corresponding "Milestone" column, with the exception of those rows that are already populated with Deliverables/Tasks. As part of the Project Management Approach section of their proposals, Bidders shall explain how results achieved as part of the "Deliver HOMES/HEAR rebates to eligible recipients" milestone (e.g., number of rebates deployed) are to be measured against established program performance goals for each invoicing period.

All prices, costs, and terms and conditions submitted in the proposal shall remain fixed and valid commencing on the opening date of the proposal until the contract terminates or expires. A completed Cost Proposal - Pricing Schedule must be submitted with the proposal response.

This funding amount does not include the programmatic funding for home energy rebates the Contractor will deliver to eligible recipients. Funding availability for the Contractor is contingent upon successful submission of Application and continuation application documents through which NDEE will secure tranches of funding for the Home Energy Rebate Programs.

FIXED PRICED, DELIVERABLE BASED PAYMENT SCHEDULE

Milestone	Deliverables/Tasks	Invoicing Schedule	Total Payment
PART 1			
Enable NDEE's submission of application materials required for HOMES program launch.	1. Identify the information required for each Application. 2. Recommend sections to be deferred to the State Implementation Blueprints. 3. Review NDEE's draft responses to certain Application sections as well as analysis conducted and stakeholder input received to date. 4. Engage with stakeholders and conduct supplemental analysis needed to successfully develop the Applications. 5. Submit complete drafts of all Application documents to NDEE for review, ensuring compliance with Guidance Documents. 6. Integrate NDEE feedback and submit final versions to NDEE for submission to US DOE.	Monthly during Part 1 of the Statement of Needs	\$ 330,000.00
Enable NDEE's submission of application materials required for HEAR program launch.	1. Identify the information required for each Application. 2. Recommend sections to be deferred to the State Implementation Blueprints. 3. Review NDEE's draft responses to certain Application sections as well as analysis conducted and stakeholder input received to date. 4. Engage with stakeholders and conduct supplemental analysis needed to successfully develop the Applications. 5. Submit complete drafts of all Application documents to NDEE for review, ensuring compliance with Guidance Documents. 6. Integrate NDEE feedback and submit final versions to NDEE for submission to US DOE.	Monthly during Part 1 of the Statement of Needs	\$ 330,000.00
Enable NDEE's submission of the Market Transformation Plan.	A market transformation plan in compliance with current DOE requirements will be drafted and submitted to NBEE.	One-time payment upon US DOE approval of the Market Transformation Plan	\$ 125,000.00
PART 2			
Establish HOMES Program delivery infrastructure.	Identify program goals and metrics. Complete design of the program with NDEE.	Monthly during Part 2 of the Statement of Needs	\$ 75,000.00
Establish HEAR Program delivery infrastructure.	Identify program goals and metrics. Complete design of the program with NDEE.	Monthly during Part 2 of the Statement of Needs	\$ 75,000.00
Deliver HOMES rebates to eligible recipients.	Provide turnkey program implementation services including program management, software solutions, state and federal reporting, contractor recruiting and coordination, funds disbursement, AFWA controls, and financial management.	Monthly during Part 2 of the Statement of Needs	\$ 7,175,000.00
Deliver HEAR rebates to eligible recipients.	Provide turnkey program implementation services including program management, software solutions, state and federal reporting, contractor recruiting and coordination, funds disbursement, AFWA controls, and financial management.	Monthly during Part 2 of the Statement of Needs	\$ 7,175,000.00
Enable NDEE's submission of quarterly reports to US DOE.	Assemble draft quarterly reports for NDEE's review and submission to US DOE.	Monthly during Part 2 of the Statement of Needs	\$ 250,000.00
Enable NDEE's submission of program continuation applications to US DOE to unlock funding tranches 2-4.	Create three (tranches 2-4) draft continuation applications for NDEE's review and submission to US DOE.	Payment upon US DOE approval of each continuation application	\$ 75,000.00
Enable NDEE's submission of required report(s) at close-out of the programs.	Generate draft close out reports in compliance with NDEE, state, and federal requirements.	One-time payment upon U.S. DOE approval of the close-out report(s)	\$ 150,000.00
Total Cost			\$ 15,760,000.00

OTHER COSTS

(Bidder to fill in)	
	\$ -

	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
(Bidder to fill in)		
	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
	\$	-
Total Other Costs	\$	-

TOTAL PROPOSAL
AMOUNT

\$
15,760,000.00

Provide any additional pricing information on ways NDEE can realize additional savings through Bidder below: