### 2019 Installed Measures by Program

<table>
<thead>
<tr>
<th>Measure</th>
<th>HEE Program</th>
<th>LIW Program</th>
<th>TOTALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Infiltration</td>
<td>2,580</td>
<td>13,308</td>
<td>15,888</td>
</tr>
<tr>
<td>Ceiling Insulation</td>
<td>208</td>
<td>6,050</td>
<td>6,258</td>
</tr>
<tr>
<td>Central Air Conditioner</td>
<td>32</td>
<td>32</td>
<td>64</td>
</tr>
<tr>
<td>Central Heat Pump</td>
<td>20</td>
<td>20</td>
<td>40</td>
</tr>
<tr>
<td>Energy Star Window</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Showerheads</td>
<td></td>
<td>857</td>
<td>857</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>2,841</strong></td>
<td><strong>20,268</strong></td>
<td><strong>23,109</strong></td>
</tr>
</tbody>
</table>
2019 CUSTOMER SATISFACTION SURVEY (LIW Only)

- Customers “overall satisfaction” was 95% that reported very to extremely satisfied with the energy efficiency upgrade experience in 2019 up from last year’s 93%.

- 96% of customers report a very to extremely positive experience of installation or work performed.

- Customers satisfaction of the education provided about the Oncor program significantly decreased to 91% compared to 2018 that was at 100% and in 2017 at 99%.

- 91% of customers were very to extremely satisfied with information provided about the program incentive, which is significantly higher from last year’s 78% that were aware that Oncor offered an incentive.

- Satisfaction of the work crew’s clean-up of site was at 95% up from last year’s 92%.
2019 SERVICE PROVIDER RECOGNITION

Conergy

THANK YOU for a Job Well Done!
HEE and LIW Reserve Option will have three (3) tiers of funding

- Tiers of $5,000, $15,000 and $30,000 will be allotted based on prior year performance.
- Each SP meeting their milestone will receive their tier allocation amount at the beginning of each month (if funding is available and SP’s CFR is less than 5%).
- Any SP not meeting their 90% milestone will lose their remaining funding and move to the next lower level of allocation.
- If the SP wants to continue in the program they will be put in the next lower tier.
- If SP misses their milestone in the lowest level of allocation they can continue participation in the program at the Program Managers discretion.
PROGRAM FUNDING

• **SP's can request additional funding (via email)** during the month if funding is available and CFR is less than 5% once they have submitted 75% of their tier allocation.

• SPs exceeding their allocation for two consecutive months will be eligible to move to the next higher level of allocation if their CFR is less than 5% and funding is available.

• New SP's will start in lowest tier.

• When overall funding cannot support the monthly allocation each SP will receive either 10%, 20% or 30% of the remaining funding based on their allocation tier.
## PROGRAM FUNDING

### Weekly PR Cap $15,000

<table>
<thead>
<tr>
<th>Allocation Tiers</th>
<th>$ 5,000</th>
<th>$ 15,000</th>
<th>$ 30,000</th>
</tr>
</thead>
</table>

### Milestone Dates

<table>
<thead>
<tr>
<th>Milestone Dates</th>
<th>Required</th>
<th>Submitted</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 1st</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>April 2nd</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>May 1st</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>June 1st</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>July 2nd</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>Aug 1st</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>Sept 3rd</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>Oct 1st</td>
<td>90%</td>
<td>90%</td>
<td>90%</td>
</tr>
</tbody>
</table>
## 2020 Budget

<table>
<thead>
<tr>
<th>Program</th>
<th>2020 Incentive Budget</th>
<th>PR Incentive Range (Weekly)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Energy Efficiency</td>
<td>$8,502,750</td>
<td>$500 - $15,000 – Reserve</td>
</tr>
<tr>
<td>Low-Income Weatherization</td>
<td>$5,965,150</td>
<td>$500 - $15,000 - Reserve</td>
</tr>
</tbody>
</table>
NEW CUSTOMER AGREEMENT (CA) – SHORTER AND EASIER

CUSTOMER AGREEMENT & ACKNOWLEDGEMENT

<table>
<thead>
<tr>
<th>TX</th>
<th>Customer Name</th>
<th>Street Address</th>
<th>City</th>
<th>Zip Code</th>
<th>Best Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Energy Efficiency Service Provider</td>
<td>Street Address</td>
<td>City</td>
<td>State</td>
<td>Zip Code</td>
</tr>
<tr>
<td></td>
<td>Subcontractor</td>
<td>Street Address</td>
<td>City</td>
<td>State</td>
<td>Zip Code</td>
</tr>
</tbody>
</table>

Energy Efficiency Service Provider ("EESP") is participating in one of the following Standard Offer Programs ("SOP") developed by Oncor Electric Delivery Company LLC ("Oncor"). Check One: ☐ Hard-to-Reach/Low-Income SOP ☐ Residential/Home Energy Efficiency

Oncor ESIID number: ________________________________

☐ If checkbox is checked Host Customer (HC) acknowledges the HVAC equipment that was replaced through this project was functioning and the age of the equipment replaced is reported correctly and this program was responsible for the HC’s decision to replace the HVAC equipment.

EESP: ____________________________________________ Subcontractor: ________________________________

Signature & Date

Signature & Date

*Energy efficiency improvements agreed upon have been installed, and I have executed and been given a copy of the Agreement.*

Customer: _______________________________________

Signature - Customer or Authorized Representative & Date
### PROGRAM CHANGES

### HEE INSULATION INCENTIVES – FLAT RATE

<table>
<thead>
<tr>
<th>Heating Type</th>
<th>Incentive per Sq. Ft.</th>
<th>Average incentive for a 1,500 Sq. Ft. Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electric resistance</td>
<td>$0.15</td>
<td>$225.00</td>
</tr>
<tr>
<td>Heat pump</td>
<td>$0.13</td>
<td>$195.00</td>
</tr>
<tr>
<td>Gas</td>
<td>$0.10</td>
<td>$150.00</td>
</tr>
</tbody>
</table>

**Guidelines and Requirements:**
- Incentives based on Sq. Ft. rather than existing insulation level
- Existing insulation must be R22 or less
- Required to insulate up to R38
**PROGRAM CHANGES**

**LIW INSULATION INCENTIVES – FLAT RATE**

<table>
<thead>
<tr>
<th>Heating Type</th>
<th>Incentive per Sq. Ft.</th>
<th>Average incentive for a 1,500 Sq. Ft. Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electric resistance</td>
<td>$0.46</td>
<td>$690.00</td>
</tr>
<tr>
<td>Heat pump</td>
<td>$0.21</td>
<td>$315.00</td>
</tr>
<tr>
<td>Gas</td>
<td>$0.18</td>
<td>$270.00</td>
</tr>
</tbody>
</table>

**Guidelines and Requirements:**

- Incentives based on Sq. Ft. rather than existing insulation level
- Existing insulation must be R22 or less
- Required to insulate up to R38
PROGRAM REMINDERS

MEASURE DOCUMENTATION REPORTING REQUIREMENTS

Air Infiltration

For homes that achieve a CFM reduction percentage of 30-40%

• Pictures of pre and post manometer, pictures of all improved areas and written form describing pictures are required to be uploaded

• iTEC report required for all single-family locations. Not required for Multi-family

Ceiling Insulation

For all installations

• No pictures are required

ENERGY STAR® Windows

• Picture of the ENERGY STAR label from window
PROGRAM REMINDERS

REPORTING AND FAILURES

• **Email addresses** for customers are required
  
  • If email address is not available enter **na@na.com**

• “**Primary Language**” on customer tab field should be populated
  (Example: English, Spanish, Vietnamese, Indian or Other)

• **Failures** will be classified as “**Quality**” or “**Data entry**”
  
  • **Data Entry** – human error/entries in EEPM (Fixable)
  
  • **Quality** – installation issue and/or equipment
IMPORTANT REMINDERS

PAPERWORK

• Elimination of hard copies/paperwork

• All paperwork including the PR Summary, Customer Agreement (CA), and Income verification certificates should be uploaded under “Attachments” for each Production Report

• E-signature will be offered through an online app for the CA
  • Customer and Provider will be able to sign CA electronically
  • Customer will need to receive a copy of the signed CA and Income verification (LIW) based on their preference

• PR Summary will be e-signed and uploaded for each PR
# IMPORTANT REMINDERS

## RESIDENTIAL PROGRAM TIMELINE

<table>
<thead>
<tr>
<th>Step</th>
<th>Date</th>
<th>Event/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Feb 3</td>
<td>HEE &amp; LIW Programs Open for Applications</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Feb 3 - 28</td>
<td>Oncor reviews all applications and determines funding tier level for each Program Option</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Feb 4 - 10</td>
<td>Oncor contacts each SP with allotted funding level for each Program Option</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>Feb 10</td>
<td>HEE &amp; LIW Programs Open</td>
</tr>
</tbody>
</table>

**NOTE:** Any work or installations completed before the program opens on **February 10** will **NOT** be accepted.
IMPORTANT REMINDERS

CUSTOMER INFORMATION

Leave a copy with each customer after work is completed!

- Customer Agreement (Electronic)
- Income verification (LIW only) (Electronic)
- Customer Disclosure Notice (Hard copy)
- Invoice from Service Provider
- Energy Efficiency Brochure
IMPORTANT REMINDERS

Energy Efficiency Tips Brochure

ORDERING MARKETING MATERIALS

Brochures can be ordered online in quantities of 200 brochures for $25 per order or English/Spanish combo pack 300 brochures for $30 per order.

To order, visit: https://www.nationsprint.com/clients/thinc-big
IMPORTANT REMINDERS

SP MARKETING MATERIALS

2020 Marketing Activity

- Any and All marketing activity **MUST** be reviewed and approved by Oncor prior to use.
- Use of the Oncor logo is prohibited
- Acceptable marketing activity can include:
  - Social media
  - TV and/or Radio
  - Postcards
  - Newspaper
  - Other print advertising

**Example:** George’s Energy Solutions is a participating service provider in Oncor’s Low-Income Weatherization Program. Through this program, we are able to install energy efficiency upgrades to help our customers reduce energy consumption.
IMPORTANT REMINDERS

THREE-STRIKE POLICY

• The Three-Strike Policy will be enforced

• Failures are Strike 1 offenses

• Failures will be classified as “Quality” or “Data entry”

  • **Data Entry** – human error/entries in EEPM (Fixable)
    • 3+ “Data Entry” failures results in a 1-month lockout

  • **Quality** – installation issue and/or equipment

• Major issues identified, such as fraud, improper work or testing protocols may result in permanent termination
POST INSPECTION

COMMON FAILURES

- Reporting the wrong heating type
- Reporting the wrong square footage
- Wrong ESI ID reported for installed address
- Inform Customer of the inspection process
- Pre/Post manometer pictures – reduction greater than 30%
### WHO DO I CONTACT

<table>
<thead>
<tr>
<th>Question</th>
<th>Program Manager</th>
<th>Inspection Manager</th>
<th>EEPM Help Desk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unusual situation at customer’s house</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How to create a PR</td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Discuss/Dispute a Failure</td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Submit a “Duplicate Measure” request</td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Request more funding</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance question</td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Program feedback</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Question about the Program</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FINAL TAKEAWAYS…

• DO NOT start work until you are “Approved”.

• Keep insurance up to date throughout the ENTIRE year.

• If you change company name or Tax ID, contact the Program Manager immediately.

Read the Program Manual.

• If you discover an error in submitted projects, contact the Program Manager immediately.

• Have a question? Call the Program Manager and ask before proceeding.
CONTACT INFORMATION

Program Manager
Carl Brown
(214) 486-3244 office
Carl.Brown@oncor.com

Program Manager
Joanna Gomez
(214) 486-4153 office
Joanna.Gomez@oncor.com

Inspection Manager
Terry Manning
(214) 486-4624 office
tmanning@oncor.com

Program Manager (New)
Jeff Reed
(214) 486-6966 office
Jeff.Reed@oncor.com

EEPM Help Desk
(866) 258-1874
EEPMSupport@oncor.com

Insurance
eepminsurance@oncor.com
thank you for attending our 2020 Residential Program Kick-Off Presentation