



Wattsmart Homes Program  
Evergreen Consulting Group  
**2020 Annual Report**

January 15, 2021



**ROCKY MOUNTAIN  
POWER**  
POWERING YOUR GREATNESS



**Evergreen**  
Consulting Group



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# SUMMARY & HIGHLIGHTS

In this section we will review who our team is, our 2020 accomplishments, as well as go over key highlights from this year.

## TEAM



Dan Dent



Sarah Jenks

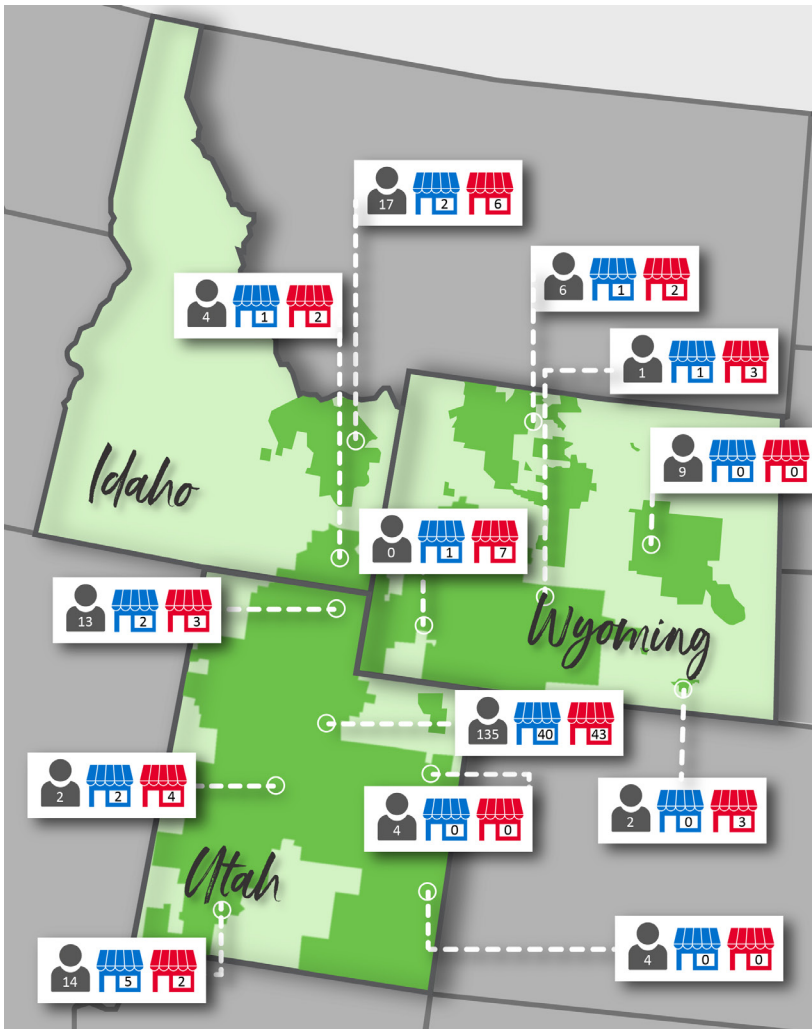


Shane Sell



Shelly Bouvang

## MARKET OVERVIEW



### 2020 Facts

- ▶ 149 Trade Allies Approved
- ▶ Completed 660 Trade Ally Outreach contacts
- ▶ Completed 743 Retailer Visits
- ▶ Implemented Retailer Tiering System

### Key

- Service Territories
- Tier 1 Retailers
- Tier 2 Retailers
- Trade Allies

## 2020 ACCOMPLISHMENTS



### 100% DELIVERY

Successfully managed **ALL** contract commitments and deliverables, including outreach and inspection field service work during the challenging COVID-19 restrictions and impacts.



### BUDGET MANAGEMENT

Managed and delivered contract services at **98.8%** of budget.



### PROGRAM LEADERSHIP

Revised and standardized weekly, monthly and quarterly reports and reporting tasks, including the use of Salesforce to enable more time to be spent performing field services work.



### GOAL ACHIEVEMENT

Supported 100% program goal attainment in Utah and Wyoming for both Lighting and Non-lighting and 100% for Lighting in Idaho (non-lighting in Idaho fell short at roughly 40%).



### CONTRACTOR & RETAILER OUTREACH

149 trade allies approved. Completed 660 trade ally outreach contacts. Completed 743 retailer visits. Initiated, developed and implemented a Retailer Tiering System to prioritize Retailers and limit program budget and resources.



### ONLINE NETWORK MANAGEMENT

Managed & recruited transition of **100%** of trade contractors to a new Evergreen digital program participation agreement. Cleaned list of trade allies to prioritize participating trade allies vs. non-participating trade allies. Supported the training and education of contractors and end-use customers with the introduction of a new online incentive application portal.



## STRATEGY & PLANNING

Developed and provided leadership for an overall program “Go-to-market” strategy and plan for introduction of Dual Fuel Heat Pumps as a primary measure in the program. Developed and presented a detailed and informed 2021 Evergreen Strategic Plan.



## INSPECTIONS

138 In-person and desk inspections.

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## KEY HIGHLIGHTS

2020 was definitively marked by the COVID-19 pandemic and the related effects to the economy, including restrictions with face-to-face visits and other related field work. While staying busy, trade allies, especially contractors were very much focused on adapting to the pandemic-forced restrictions and focused on staying in business. Retailers also had many restrictions and constant changes through the year needing to match health and safety precautions of employees, vendors and customers with business continuity and market need.

The Evergreen team adjusted and adapted rapidly to the changes in the marketplace and stayed focused on key outreach connections, as well as modifying inspection protocols to do desk inspections exclusively at times.



## Our focus has largely been on the following areas for program support:

- Ensured strict adherence to safety precautions for our staff, trade ally staff and customers due to the COVID-19 pandemic. Field activities required adjustments and flexibility, including:
  - Desk inspections temporarily replaced all site-based inspections.
  - Limited face-to-face contact with trade allies to meet pandemic forced restrictions.
  - Limited face-to-face contact with retail store managers or personnel unless directed by retailer but continued POP promotion and product inventory verifications.
  - Increased phone calls and email communications to trade allies to stay connected and obtain updates on their business status.
- Continuing to recruit, sign-up, troubleshoot and coordinate training and support for trade allies with the program and especially with the new incentive portal launched early in the year.
- Where applicable and within the restrictions of COVID-19 safety requirements, continue to build and improve upon existing, new, participating, and non-participating trade ally relationships and engagement.
- Prioritizing and visiting Retailers based on COVID-19 safety requirements and tiering. Tiering was based on available products, interest in the program and overall volume for the Retailer. The focus of Retailer visits was to ensure POP advertising and materials, as well as checking matching product inventory.
- Performing inspections per applications and program requirements. Program inspections were performed without a hitch and with continued documentation. We maintained the required 5% inspection rate on program incentive applications throughout the year.
- Supporting marketing and other program efforts to achieve overall lighting and non-lighting program measure participation.
- Answering hotline questions and inquiries as applicable and within the required 24-48-hour timeline.
  - Received and addressed 41 valid hotline calls during the year.

## KEY HIGHLIGHTS: *Continued*

- Ensured 100% program delivery quality and compliance.
- Tracked and filed all outreach and inspection details electronically.
- Prepared 52 weekly program activity reports detailing weekly team outreach and inspection activities, as well as market and trade ally feedback.
- Prepared eight monthly reports summarizing key activities, results and improvement recommendations for the month and provided budget and expenditures status and forecasts.
- Provided four quarterly and four program compliance reports summarizing quarterly results and verifying 100% program and contract compliance.
- Developed and launched detailed Dual Fuel Heat Pump Go-to-Market strategy and plan for field services work, including: marketing, training, outreach and inspections.
- Prepared detailed 2021 strategic implementation plan for field services work.

## OUTREACH HIGHLIGHT

When COVID-19 shuttered businesses in Utah and nationwide in the Spring, except “essential” businesses like HVAC contractors; Shelly Bouvang had just recently recruited Smedley’s Heating & Air back into the program after being inactive for several years. Gary Boam, Operations Manager at Smedley’s called Shelly during this shut-down needing help with a bid they were providing for an all-electric home to install a multi-stage mini-split heat pump system. Mr. Boam wanted to make sure they provided the bid on the correct model number that qualified for the program incentive. Once he provided the bid to the customer, they performed the installation. He then needed assistance on how to submit the incentive application in the new incentive portal. Shelly sat down with Mr. Boam and walked him through the application submission. Gary had a positive trade ally experience with the overall program participation, including the incentive application portal because of Shelly’s proactive service. It also reaffirmed that he can rely on Shelly to support his company and the customer to ensure the highest possible customer experience.

## PRIMARY IMPLEMENTATION TACTICS

The primary tactics we implemented and leveraged throughout the year to achieve program results are listed below:

- 1** We collaborated with Rocky Mountain Power and CLEAResult daily to meet customer and program needs. We initiated and actively participated in weekly program coordination calls to ensure our activities remained aligned to optimize program results, customer satisfaction and cost-effectiveness.
- 2** We worked hard to collaborate and coordinate with CLEAResult to maintain effective communications to provide seamless program delivery to customers and trade allies. Through this collaboration we established an ongoing process to identify program improvements to the incentive portal, shared ideas on marketing, promotions and program design and delivered joint messaging to the market.
- 3** We initiated and supported program marketing strategies and initiatives, including several email campaigns to bring program awareness and information to trade allies regarding program participation opportunities, program changes and the benefits of program and measure participation for them and the customer. We also collaborated with CLEAResult to inform and co-develop marketing and engagement strategies for both contractor and retailer initiatives to increase program measure participation across all three States.
- 4** We largely employed the 80/20 rule when targeting and building relationships with contractors. We sought out the allies that not only have sincere interests to participate in the program but can also represent a significant portion of the program participation as a percentage of their business. We were successful at recruiting new allies and some allies that had previously abandoned the program. We have established ourselves as the “go-to-person” for trade ally questions and support. We did this through making ourselves readily available, providing round-the-clock customer service, clearly communicating the value proposition for allies to participate and building trust and confidence by supporting their projects and needs as they relate to the program.





## PRIMARY IMPLEMENTATION TACTICS: *Continued*

**5** We conducted all inspections, whether on-site or desk inspections with customer service and satisfaction as the priority. We did this by scheduling specific appointments with customers and explaining the purpose and need for the inspection, including ensuring they received the appropriate service and value from the program and ally. We ensured that our inspection work was done timely and accurately through proper scheduling, organization and communications, as well as close collaboration with CLEAResult.

**6** We insured that customer and ally experience met or exceeded Rocky Mountain Power standards and was the highest possible through our work and interactions. We did this by identifying and engaging the available resources that would support the customer's needs. We also stayed fully engaged with the customer, even beyond our assigned responsibilities, until the customer's question or issue was satisfactorily resolved. We worked in coordination and collaboration with all members of the program delivery team, as well as Rocky Mountain Power representatives when and where needed to prevent and resolve program and customer issues.



**7** We provided regular, frequent, timely and accurate feedback and market intelligence to support program operations, improvements, strategies and decisions. We provided this feedback through several methods and channels, including: a) phone calls and emails immediately when issues arise; b) weekly implementer coordination meetings; c) weekly, monthly and quarterly written reports; d) bi-weekly Program Manager update meetings; and e) periodic program lunch meetings with Program Manager (this was limited to only three because of the pandemic).



## **LESSONS LEARNED**

Throughout the year we provided regular and timely feedback, insight and decision making to ensure program continuity, consistency and continuous improvement. From this work and experience, listed below are our top lessons learned from the year. These lessons will assist us and the program as we move forward to continually adapt to the needs of the customer and the market.

## 1. ADAPT

Can adapt to significant market changes quickly and accurately, such as those brought about by the COVID-19 pandemic, and still maintain program continuity and results. We can do this by identifying the objectives, needs and requirements of all stakeholders upfront, then prioritizing based on program resources and developing subsequent strategies and plans to execute that will satisfy those needs and priorities.

## 2. IMPROVE

Can improve program cost-effectiveness and more fully leverage limited program resources by critically assessing trade ally lists, participation, motivations and capabilities, then adjusting plans, targets and outreach according to priority and tiering of account calls, frequency of contacts, relationship building and maintenance efforts.

## 3. CONDUCT

Can conduct desk inspections more cost-effectively than on-site inspection with the same level of quality assurance, customer service and accuracy.

## 4. COMMUNICATE

Not all contractors fully understood or understand the value proposition that the program presents to their business and the customer. Consequently, clearly communicating this value proposition for their respective business is a priority to engage and re-engage contractors in the program.

## 5. ASSIST

There is some confusion with some trade allies that participated in past years regarding the availability of incentives. Many think that the incentives went away with the implementation of the Distributor driven initiative for furnaces and air conditioners. Regularly need to explain that there are still incentives available to the customer and the trade allies.

## 6. REASSURANCE

Some of the larger trade allies have expressed disappointment with not being involved or “partnered” with for future planning of program measures. They feel that they should be included to increase more participation amongst themselves, distributors and manufacturers to ensure better product availability.

## 7. INCENTIVES

Trade allies that have not previously participated in the program appreciate knowing that there are incentives available for them as well.

## 8. ONLINE PORTAL

Trade allies like the application incentive portal once they become familiar with the process and system.

## 9. SUPPORT

Trade allies like that they have a “live” or “go-to” person for program related support.



# RELATIONSHIP MANAGEMENT



## NETWORK DEVELOPMENT

Throughout the year we continually managed network requirements. This included making refinements as needed and opportunities arose to **improve the experience** for the trade ally participation. Many of these improvements related to recommended changes to the program incentive portal to enable easier and more accurate use by both the trade ally and in some cases the customer.

We **managed and updated** the trade ally program implementation manual, as well as related forms, applications and agreements as needed. These updates largely related to changes in program measures or incentives. When additional measures were added to the program the online application was updated within **72 hours**.

We undertook a significant project to transition all trade ally participation agreements to an **Evergreen agreement** on behalf of the program. This was a not only significant feat for our team but was significant for many of the trade allies to re-engage in the program. This work resulted in **current and updated agreements**, as well as identified opportunities and challenges for some trade allies that were not participating any longer. We were able to leverage this work to re-instate some non-performing or non-participating trade allies, as well as **“clean”** the overall list of participating trade allies to only include those that are active and interested. **Note: some trade allies that were previously on the list had gone out of business.**

For our ongoing recruitment and management work, we **developed and implemented an online trade ally application portal** specific for the program. This portal was launched early in the year and continues to run as an **effective program tool** making the process for trade ally participation easier and more convenient, while keep program costs low and automating the “document trail.” In cases where the trade ally still prefers or only can participate using traditional paper application methods, we have kept this as a possibility and back-up option for the program.

We partnered with TM’s (Territory Managers) from various wholesalers, distributors and manufacturers to promote Wattsmart Existing Homes program to **increase participation** of trade allies in the program, as well as utilize qualified products/brands to ensure both trade allies and customers receive **approved rebates**.

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Here are some results from our network development and management:

### **PARTICIPANT AGREEMENT COMPLETIONS**



**103** RENEWED APPLICATIONS

**46** NEW APPLICATIONS

**149** TOTAL APPLICATIONS

- Of these 149 applications processed, 134 applications were approved with an average of 13.6 days per application. The remaining 15 applications have a higher processing rate due to time it took to get completed application information from the trade ally.
- All completed applications were 100% accurate and complete before being approved and finalized.
- There were 92 trade allies removed from the program for reasons that include lack of interest, lack of participation, no response to repeated request to obtain required information and/or contractor was out of business.
- This work ensures that the program trade ally list on the website is current and accurate and provides customers a better customer experience.

## OUTREACH - TRADE CONTRACTORS

### APPLICATION, PORTAL & PROJECT SUPPORT

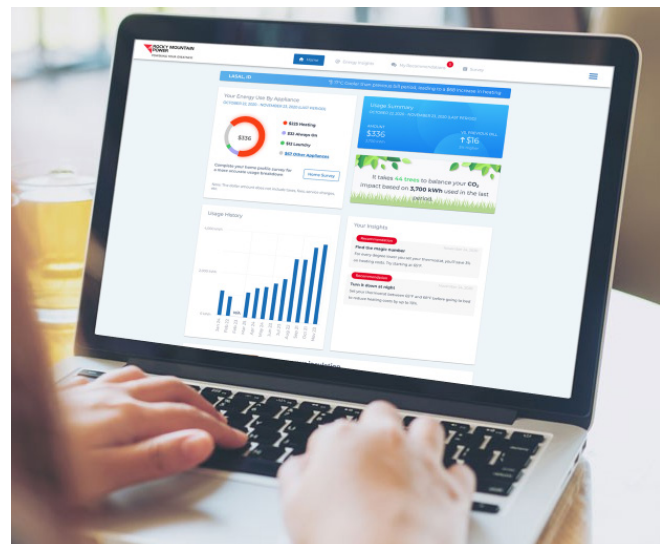
- The launch of the rebate portal was a little rocky due to a combination of things. The email sent to all Trade Allies in most instances went to spam or junk folders. The email also did not specify in the Subject line area what the email was for and this also generated confusion. After much discussion, a new email was generated and sent to Trade Allies with a follow up phone call. This garnered a larger increase in portal registrations.
- The portal has experienced a few technical issues that have needed more IT support beyond what is readily available making it difficult to help some trade allies and customers alike in the required 24-48 hours.
- Trade allies still struggle with glitches or issues with the portal, luckily CLEARResult has been able to provide hard copy applications for those instances when the portal just won't cooperate.
- The rebate portal is not easy to navigate for the first time for the trade allies or customers. Some trade allies have indicated that it can take up to 4 or 5 applications to achieve a working knowledge of the incentive application portal.

### TRAININGS/EVENTS

- Coordinated with CLEARResult on portal trainings at the Distributor level.
- Conducted in-person portal assistance/trainings during the COVID pandemic.
- Coordinated with NEEA on inviting Utah, Idaho and Wyoming Trade Allies to attend DFHP and HP webinar-type trainings online.
- Assisted in Zoom trainings with CLEARResult to select Trade Allies on DFHP initiatives.

### HIGHLIGHTS/IMPROVEMENTS

- Networked with past contacts within the HVAC industry who are now Trade Ally business owners and Territory Managers for Distributors. Able to use past connections to reconnect and discuss Wattsmart. This in turn has helped garner more interest in the program and helped encourage other trade allies to signing up for the program.



## OUTREACH - TRADE CONTRACTORS: *Continued*

### ADAPTED TO CHANGING REQUIREMENTS/NEEDS FROM COVID-19

- Relatively seamless transition from the current in-person visits to phone calls with Trade Allies. With the State mandated shut-downs, all in-person visits with Trade Allies were basically non-existent with the exception of a few contractors who needed special attention with the application portal. For example, Smedley's Heating & Cooling had an unusual home that they were installing multi-head mini splits and weren't sure how to enter it in the portal. All Trade Allies were receptive and understanding considering we were all in the same situation of uncertainty at the beginning of the pandemic. This same approach is still in effect 10 months into COVID.
- Masks are the rule with the State mandate, despite this we have focused building and maintaining effective trade ally communications and relationships, ensuring that the trade allies know we are always available via phone and email.

### CONTRACTOR OUTREACH CUSTOMER SERVICE HIGHLIGHTS

The example below illustrates one of many ways we provided excellent customer service while performing our role for contractor outreach. This example involves a Rocky Mountain Power employee in Wyoming.

**"From:** Lindemann, Mary (PacifiCorp)  
**Sent:** Monday, October 19, 2020 1:05 PM  
**To:** Fredrickson, Jillian (PacifiCorp) <[Jillian.Fredrickson@pacificorp.com](mailto:Jillian.Fredrickson@pacificorp.com)>  
**Subject:**

Hi Jill!!!

Just wanted you to know that your co-workers Shelly is an incredible, patient and go getter of an employee!!

For the past month I have been working with an elderly man that was had installed a ductless type heating system and wanted to do the Refund program that we provide! Well as you are aware the web site for that information is tiresome and very hard to maneuver through And he missed that his provider, was not one of the companies that RMP approved. Shelly took charge and replied to all of my phone calls And texts,, and there were many!! She got Custom Air to sign up as a provider and she submitted the refund app for Jerry ( customer).

I tried to do it Friday and I could not deal with it!!!!!!!!!!!!!! This morning, Jerry came in to the office and he was elated!! After a month of working and waiting for a response he finally got one stating that his Application has been received and refund will be processed in 4 days!!

This NEVER would of happened without the help from Shelly! She took charge and submitted the app for us!!

She was always friendly, prompt and knowledgeable of her work!!

Just thought you should know you have a great employee there!!

Mary"



## CONTRACTOR OUTREACH CUSTOMER SERVICE HIGHLIGHTS: *Continued*

- We practice a continuous improvement delivery culture focused on customer service and customer satisfaction. This includes our work with all trade allies, including contractors who prefer to let their customers submit their own rebates. While this may be fine for some tech savvy customers, it is not for others. Because of this, at times some of these trade allies refer customers to us for assistance with their rebate application and process. We have a practice of taking care of the customer by connecting them with the right resources, walking them through the process and following through until the customer's needs are satisfied. Many times, over the course of 2020 this included providing significant rebate application portal support, including making many portal improvement recommendations.

A couple of these tasks and recommendations included:

- Providing stats on the number of times the portal is accessed and how many times it is used by the same person (if this is available). This provides insight to how many times the portal is accessed and whether it is working properly or not. We have found that trade allies and customers both run into portal IT-related issues which often leads to them giving up on submitting their rebate application. Knowing ahead of time that the portal is not working properly for these customers and can be modified helps to prevent future customer dissatisfaction.
- Provide a backup IT person during holidays so if portal problems arise, there is someone available to either fix the issue or communicate the wait time. This will ensure customers and/or Trade Allies are being addressed in the allotted 24-48 hours.



## CONTRACTOR MARKET INSIGHT

2020 was an interesting year engaging trade allies. First quarter outreach included mostly in-person visits; then COVID-19 changed the dynamic. This affected most engagement changing from face-to-face visits to phone conversations and emails. Below are a few highlights and market feedback:

- In 2020, there were 149 trade ally participation agreements registered with an additional 46 new trade allies recruited and the reactivation of 103 trade allies.
- Relationship building continues to be an ever-evolving process with participating and non-trade allies. Contractor comfort level has increased with the program as they gain program knowledge and trust they have a reliable go-to person to help them along the way.
- Program details and benefits are continually being shared with all contacted trade allies which has created an increased awareness and participation in receiving incentives as a trade ally.
- Many participating trade allies report that this has been the busiest year in their company's history and they continue to stay busy by providing bids, installations, service work; all with minimal crews and product shortage.
  - This includes many having 'record selling years' for business. Trade allies are attributing this to many factors. One is that homeowners are spending more time at home, so they are in need or desire for home upgrades and home improvements.
- According to trade allies, they have a love-hate relationship with the program rebate portal and the process. It continues to have a few hiccups with most of those being tracked in a portal issue tracker on SharePoint. These issues are largely being resolved by CLEAResult within the allotted 24-48 hours.
- Trade Allies are continuing to follow recommended COVID-19 guidelines by following social distancing rules and minimizing contact with their customers which in turn has provided greater opportunities to discuss other home improvement upgrades over the phone.
- There have been over a dozen larger contractors who have added more to their portfolio of offerings besides HVAC which includes electrical work, extensive plumbing and the occasional weatherization services.

See chart below for 2020 Trade Ally Engagement summary:

## 2020 ANNUAL REPORT - PARTICIPATING TRADE ALLIES

| Participating Trade Allies              | ID        | UT         | WY        | TOTAL      |
|---|-----------|------------|-----------|------------|
| Total Participating HVAC                | 12        | 104        | 9         | 125        |
| Total Participating HVAC/Plumbing       | 3         | 21         | 2         | 26         |
| Total Participating HVAC/Weatherization | 3         | 8          | 1         | 12         |
| Total Participating Weatherization      | 7         | 41         | 4         | 52         |
| Total Participating Plumbing            | 1         | 2          | 1         | 4          |
| <b>Total Participating Trade Allies</b> | <b>26</b> | <b>176</b> | <b>17</b> | <b>219</b> |
| Renewal & Trade Allies                  |           |            |           |            |
| New Trade Allies                        | 7         | 32         | 7         | 46         |
| Renewal Trade Allies                    | 12        | 84         | 7         | 103        |
| <b>Total Processed Trade Allies</b>     | <b>19</b> | <b>116</b> | <b>14</b> | <b>149</b> |
| Total Trade Ally Outreach Contracts     |           |            |           |            |
| Trade Ally Contacts                     | 50        | 570        | 40        | 660        |
| Customer Contacts                       | 8         | 72         | 21        | 101        |
| <b>Total Outreach Contacts</b>          | <b>58</b> | <b>642</b> | <b>61</b> | <b>761</b> |
| Hotline Calls                           |           |            |           |            |
| Hotline Call Responses                  |           |            |           | 41         |

### OUTREACH - RETAILERS

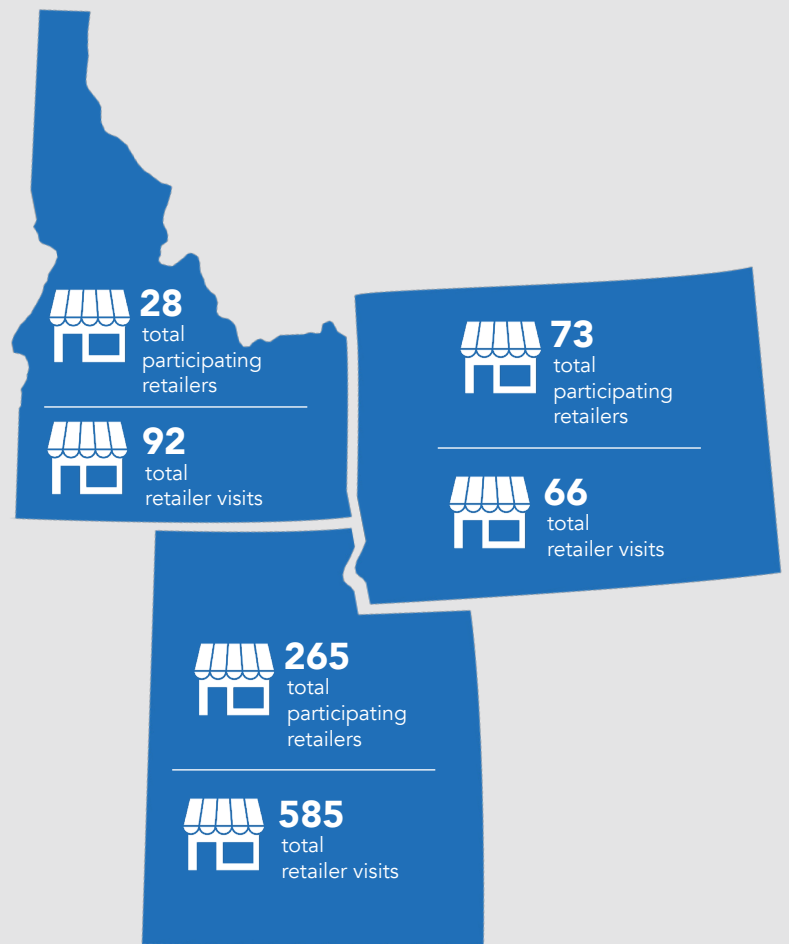
Our retailer outreach in 2020 was marked by both **volume and quality**. We made significant **cost-effective** progress and improvement to program delivery that can and will be **carried forward into 2021** and beyond. Below are some summary statistics of our activities and results:



## OUTREACH - RETAILERS: *Continued*

- Site visits continued throughout 2020 targeting all participating retailers and some non-participating retailers based upon priority tiering:
  - New advertising tags were placed in all stores in accordance and in collaboration with program needs and CLEAResult.
  - A major change that occurred this past year was changing the retailer visits schedule to focus predominantly on **Tier 1 Retailers** which includes those that are most actively participating in the program. These stores included **Home Depot, Lowe's and Costco**. These stores represented most of the program measures being sold and the energy savings achieved at the retail level.
- The retailer store visit schedule was reconfigured based on a tiered priority process to maximize budget, resources and program cost effectiveness, as well as enhanced program measure and participation priorities:
  - Tier 1 = Home Depot and Lowes
  - Tier 2 = Walmart and Ace Hardware
  - Tier 3 = All other participating or applicable retailers with store fronts.

### TOTAL PARTICIPATING RETAILERS & TOTAL VISITS IN 2020 TO RETAILERS



See chart on next page for 2020 Retailer Engagement summary:

## 2020 RETAILER ENGAGEMENT SUMMARY

| Retail Engagement  | ID        | UT         | WY        | TOTAL      |
|--|-----------|------------|-----------|------------|
| <b>Total # of Retail Field Service Visits (Tier 1-2-3)</b> | <b>92</b> | <b>585</b> | <b>66</b> | <b>743</b> |
| # of Retail Stores Reached* - Tier 1                       | 21        | 359        | 17        | <b>397</b> |
| # of Retail Stores Reached* - Tier 2                       | 30        | 125        | 25        | <b>180</b> |
| # of Retail Stores Reached* - Tier 3                       | 41        | 101        | 24        | <b>166</b> |
| Total Participating Tier 1 Retail Stores                   | 2         | 46         | 2         | 50         |
| Total Participating Tier 2 Retail Stores                   | 6         | 47         | 17        | 70         |
| Total Participating Tier 3 Retail Stores                   | 20        | 172        | 54        | 246        |

\*Contact to retail stores is almost exclusively comprised of site visits

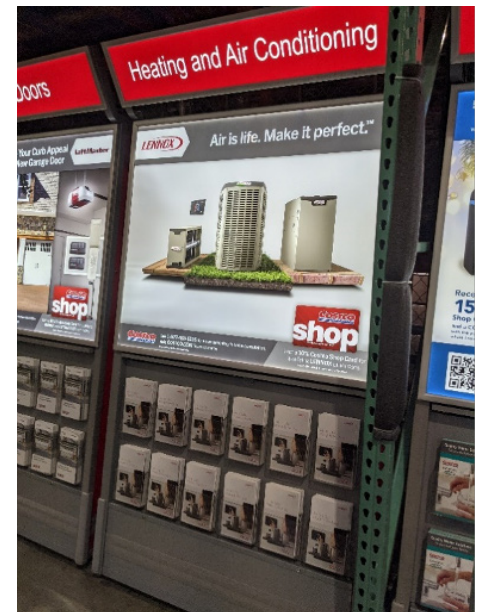
- On a weekly basis we provided feedback to CLEARResult regarding the status of what was seen and is happening at the retail level in participating retail stores. This includes feedback on point of purchase advertising and signage, product inventory and potential program design improvements.
- We researched the regular in-store promotional stands at Home Depot, Lowe's and Costco. We found these have the potential to be used as an avenue to promote, advertise, educate and sell to retail customers regarding Dual Fuel Heat Pumps. [See example photos or retailer promotional stand below:](#)



Home Depot Contractor Services Displays



Lowe's Contractor Services Displays

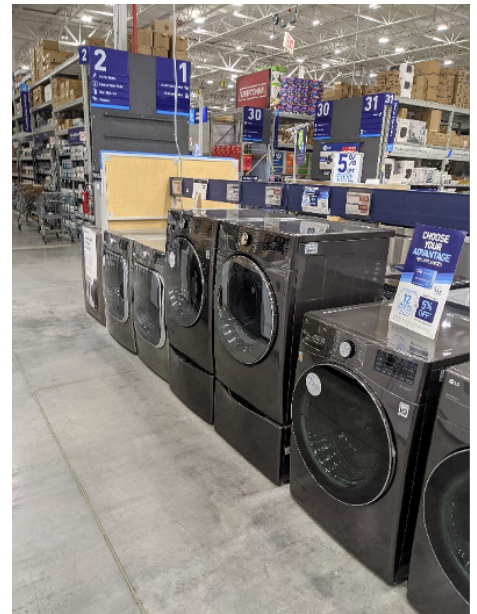


Costco Contractor Services Displays

## RECRUITED RETAILERS

- Harmon's Grocery store was added to the retailers this year.
- Many retailers will be increasing their participation with the new tariffs implemented which includes Best Buy, Lowe's and Home Depot.

See photo examples for new program tariff changes below:



## HIGHLIGHTS/IMPROVEMENTS

- Development and continued refinement of new priority tiering structure and process
  - We maximized our Retailer outreach activities by focusing mostly on retailers that were actively participating in the program. To this end, we did not make as many visits to lower tiered retailers that were not actively participating in the program. Because of this we were able to make 397 Tier 1 retailer visits in 2020 versus 283 Tier 1 retailer visits in 2019.

## HIGHLIGHTS/IMPROVEMENTS: *Continued*

- Ongoing POP advertising refinements and suggestions to reduce program cost and improve clarity of program advertising.
  - Considerable time was focused on organizing the point of purchase advertising material in binders and folders, as well as creating checklists for each measure. This has helped and will continue to maintain less time and lower program related costs, including time spent in retail stores. It also improves the quality of program delivery by helping to eliminate mistakes with the differences in point of purchase incentive advertising.
  - We met with a few of the store managers during the year to discuss how they preferred to place program advertising material. This included visits to RC Willeys and Best Buy. We discussed placing the advertising material and provided program information regarding how the incentives worked. The managers were very appreciative of these discussions.
- Adapted to ongoing and rapidly changing requirements and needs related to COVID-19 restrictions and safety protocols.
  - During the pandemic, we adapted within hours to rules and regulations of program and individual retail stores. This included not being able to visit such stores as Home Depot and others for certain periods of time. We were able to adapt our schedules and processes while maintaining timely and meaningful workload and quality and continuing to visit retailers to ensure proper point of purchase advertising and associated inventory.
  - We followed strict regulations including adhering to personal protective equipment use, such as wearing masks and using hand sanitizer for all retail visits. This included social distancing and avoiding face-to-face interactions with store managers and employees.



| Program Role                   | Strategic Priority  | Strategic Objectives  | 2020 Summary Results   |
|--------------------------------|---|---|--|
| <b>Relationship Management</b> | Develop and maintain network of HVAC contractors representing 80% of Program market.  | Build strong, sustainable and mutually beneficial relationships with HVAC contractors. Understand market opportunities and barriers for electrification.  | Continue to add new Trade Allies to the program while also maintaining current participants. Reach out to past program participants to gauge their disinterest in the program and work with them to re-enroll in the program.                        |
|                                | Organize and Facilitate Program Trainings for Installation and Services Contractors selling and installing Program measures.  | Inform and educate market and Program participating contractors regarding Program requirements, processes and market opportunities.   | Provided all participating Trade Allies with program updates and how it can benefit them and their business. Invited to NEEA webinar trainings, industry updates on future products and program updates where applicable.                            |
|                                | Place and maintain Program Point of Purchase (POP) marketing information and materials supplied by Program in retail establishments representing 90% of Program market. | Ensure Program POP information is clearly presented to inform and influence consumer purchase decisions at the time of purchase.  | Throughout the year we completed the retailer circuit consistently to all participating retailers to ensure POP advertising was in-place and correct and that matching inventory was available.  |
|                                | Provide market-based insight and feedback to Program Manager(s) pertaining to possible current and future impacts to Program.   | Maintain a pulse on market trends, activities and needs to ensure important information and feedback is communicated to the Program Manager(s) in a timely manner to inform planning and decision making. | We coordinated and provided feedback on a weekly basis to CLEAResult and the Program Manager regarding the status of the retail market and individual program measures. This included market status, as well as program improvement recommendations. |





# INSPECTION SERVICES



## QUALITY ASSURANCE & QUALITY CONTROL

- We verified rebates with customers and that equipment and measure installations adhered to local codes and regulations, as well as program requirements.
- We were able to conduct inspections successfully and accurately via mostly customer phone calls to verify measure installation versus conducting an in-person inspection.

Below are photo examples of recent site-based inspections for the new Dual Fuel Heat Pump measure.



Quality Inspection of New Dual Fuel Heat Pumps

## HIGHLIGHTS & IMPROVEMENTS

- Due to COVID, changes were made to the way inspections were conducted. Most inspections were desk inspections rather than site-based inspections. Based upon the success of desk inspections in 2020, our plan is to carry this process forward into 2021, including post-COVID-19. This will increase customer satisfaction, reduce program costs and still maintain program quality and measure verification compliance. One part of this approach is to conduct desk inspections with proven contractors given their successful program track record of compliance.
- Dual Fuel Heat pumps were introduced as a new measure. To this end, we began inspections for these measures. We performed a number of these site-based inspections in December. We have created a dedicated inspection process for this measure including taking and filing photos, recording model numbers and collaborating with CLEAResult on remaining qualifying measure requirements to ensure installations qualify under the program.



## SUMMARY INSPECTION STATISTICS



## SUMMARY INSPECTION STATISTICS: *Continued*

| <b>Idaho</b>                               |                              |                    |             |
|--|------------------------------|--------------------|-------------|
| <b>Measure Type</b>                        | <b>Applications Invoiced</b> | <b>Inspections</b> | <b>%YTD</b> |
| Attic Insulation                           | 6                            | 1                  | 17%         |
| Heat Pump System Conversion                | 1                            | 1                  | 100%        |
| Heat Pump Water Heater <sup>1</sup>        | 12                           | 2                  | 17%         |
| Ductless Heat Pump <sup>2</sup> Conversion | 7                            | 1                  | 14%         |
| Duct Seal and Insulation                   |                              |                    |             |
| Multi-Family Ductless Heat Pump            | 8                            | 8                  | 100%        |
| Central Air Conditioner                    | 3                            | 1                  | 33%         |

Heat Pump Water Heater = HPWH<sup>1</sup> | Ductless Heat Pump = DHP<sup>2</sup>

| <b>Utah</b>                       |                              |                    |   |
|-----------------------------------|------------------------------|--------------------|---|
| <b>Measure Type</b>               | <b>Applications Invoiced</b> | <b>Inspections</b> | <b>% Inspected of Applications Invoiced</b> |
| Attic Insulation                  | 2036                         | 104                | 5%  |
| DHP                               | 80                           | 5                  | 6%  |
| Heat Pump Upgrade                 |                              |                    |   |
| DHP Conversion                    | 3                            | 3                  | 100%  |
| HPWH                              | 7                            | 1                  | 14%   |
| Dual Fuel Heat Pumps <sup>3</sup> | 11                           | 6                  | 55%   |

Dual Fuel Heat Pumps = DFHP<sup>3</sup>

| <b>Wyoming</b>              |                              |                    |   |
|-----------------------------|------------------------------|--------------------|---|
| <b>Measure Type</b>         | <b>Applications Invoiced</b> | <b>Inspections</b> | <b>% Inspected of Applications Invoiced</b> |
| Attic Insulation            | 5                            | 1                  | 20%   |
| Wall Insulation             | 1                            | 1                  | 100%  |
| Floor Insulation            |                              |                    |   |
| DHP                         | 9                            | 1                  | 11%   |
| Heat Pump System Conversion | 3                            | 1                  | 33%   |
| HPWH                        | 4                            | 1                  | 25%   |
| Gas Furnace w/ ECM          |                              |                    |   |

## COMPLIANCE & APPOINTMENTS

- All inspections were scheduled with a specific appointment or a reminder was provided to the customer for all inspections scheduled more than 48 hours in advance.
- All inspection appointments were completed without missing any appointments.
- At least 5% of all inspections submitted for each measure was completed for the year.
- At least one inspection was completed for each measure type by State.

| Program Role               | Strategic Priority   | Strategic Objectives  | 2020 Summary Results   |
|----------------------------|--|---|--|
| <b>Inspection Services</b> | Efficiently and cost effectively complete the combination of assigned on-site and desk inspections within 48 hours of assignment.      | Ensure Program participation compliance, quality and accuracy of incentive paid Program measure participation. Minimize waiting period for receipt of rebate and improve customer satisfaction. | We had 100% compliance with all inspections in the timeframe required to ensure incentive applications moved through the process without delay. This included 100% compliance with quality assurance as well.  |
|                            | In collaboration with Program Manager(s), identify and implement improvements to Inspection policies, plans, processes and procedures. | Ensure continued and enhanced Program cost effectiveness and efficient and needed Program inspections.  | We made significant improvements to the inspection process in 2020. Most were related to adapting and responding to COVID-19 requirements and needs. However, some are related to overall efficiencies that will remain in place post COVID and will improve program cost-effectiveness while maintaining program integrity. |



# PROGRAM MANAGEMENT



## COORDINATION & COLLABORATION

- Coordinated with CLEARResult to produce a “Portal Issue Tracker” allowing for timely and accurate communications and documentation of updates and improvements for the incentive application portal. This helps to ensure that responsive customer service is provided in the allotted 24-48-hour timeframe required.
- Recommended to CLEARResult to “alert” incentive application portal users if they are unable to move on from one field or section to make sure all required fields have been populated.
- Work extensively and exclusively with Michelle DeGroot of CLEARResult on portal issues to troubleshoot and make improvements. This has been an effective approach to use two people to alleviate duplication of troubleshooting tasks.
- Requiring that all trade allies take a screen shot of their computer screen when experiencing incentive application portal issues to expedite troubleshooting. This helps to make sure all information is correct when dealing with problems in the portal.
- Coordinated with CLEARResult to add a file to track incentive application portal improvements based upon suggestions from trade allies.

## COORDINATION & COLLABORATION: *Continued*

- Developed a coordination file for suggestions or enhancements to current program incentive measures.
- Worked with CLEAResult to implement suggested upgrades to the incentive portal.

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## BUDGET MANAGEMENT

- We effectively managed the program budget while exceeding delivery on all commitments.
- We invoiced a total of **\$622,760** for 2020. This is **2.9% below budget** or approximately **\$18,378**.
  - We provided monthly forecasting of future month and annual expenditures.
  - Per our contract, we provided timely notifications when our budget expenditures reach **75%** and **90%**, respectively.
  - We delivered **100%** of accruals and invoices on time on or before the 25th and 15th of each month, respectively.
- Labor hours for 2020 totaled **5,697** with **88.4%** in Utah, **5.9%** Idaho and **5.6%** in Wyoming.
- We utilized more than **20 Evergreen staff members** to fully deliver program services.
- Outreach represented **65.8%** of labor hours.
- Inspections represented **2.5%** of labor hours.
- Program Management, Marketing and Administrative support represented **31.7%** of labor hours.



See chart on next page for details on budget, expenditures, forecast and labor summary:

## EXPENDITURE SUMMARY & FORECAST

### ADMINISTRATION EXPENSE FORECAST (w/ historical actuals)

| 2020              | Jan      | Feb      | Mar      | Apr      | May      | Jun      | Jul      | Aug      | Sep      | Oct      | Nov      | Dec      |
|-------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| Idaho             | \$4,022  | \$2,729  | \$4,437  | \$2,305  | \$3,193  | \$2,866  | \$2,462  | \$3,603  | \$2,029  | \$4,188  | \$4,481  | \$2,794  |
| Utah              | \$48,278 | \$45,479 | \$52,143 | \$47,480 | \$40,805 | \$41,623 | \$38,263 | \$34,732 | \$43,705 | \$46,464 | \$47,112 | \$60,901 |
| Wyoming           | \$2,987  | \$1,984  | \$4,796  | \$2,066  | \$1,498  | \$1,763  | \$4,536  | \$3,315  | \$3,112  | \$3,723  | \$3,159  | \$3,731  |
| Forecast          | \$55,287 | \$50,192 | \$61,375 | \$51,850 | \$45,496 | \$46,252 | \$45,261 | \$41,650 | \$48,846 | \$54,375 | \$54,752 | \$67,425 |
| %Time of Contract | 50%      | 55%      | 59%      | 64%      | 68%      | 73%      | 77%      | 82%      | 86%      | 91%      | 95%      | 100%     |
| %Budget Spent     | 48%      | 52%      | 58%      | 62%      | 66%      | 70%      | 75%      | 78%      | 83%      | 87%      | 92%      | 98%      |



| 2020     | 2020 Forecast Total | 2020 (w/Carryover 2019 funds) | 2020 % to Target |
|----------|---------------------|-------------------------------|------------------|
| Idaho    | \$39,108            | \$45,000                      | 86.9%            |
| Utah     | \$546,984           | \$541,138                     | 101.1%           |
| Wyoming  | \$36,669            | \$55,000                      | 66.7%            |
| Forecast | \$622,760           | \$641,138                     | 97.1%            |



# LABOR SUMMARY

## 2020 LABOR HOURS

| Full Name                        | Title                      | Actual Hours  |                |               |                |
|----------------------------------|----------------------------|---------------|----------------|---------------|----------------|
|                                  |                            | ID Hours      | UT Hours       | WY Hours      | Total Hours    |
| Outreach                         |                            |               |                |               |                |
| Tony Allen                       | Engineer                   | 53.5          | 0.0            | 0.0           | <b>53.5</b>    |
| Shane Sell                       | Sr. Analyst                | 40.5          | 1642.5         | 67.5          | <b>1750.5</b>  |
| Shelly Bouvang                   | Engineer                   | 35.0          | 1847.0         | 32.0          | <b>1914.0</b>  |
| Sheldon Cowlthorpe               | Engineer                   | 0.0           | 0.0            | 27.5          | <b>27.5</b>    |
| Federico Kahnlein                | Program Manager            | 0.0           | 2.0            | 0.0           | <b>2.0</b>     |
| <b>TOTAL OUTREACH</b>            |                            | 129.00        | 3491.50        | 127.00        | <b>3747.50</b> |
| Inspections                      |                            |               |                |               |                |
| Tony Allen                       | Engineer                   | 30.5          | 0.0            | 0.0           | <b>30.5</b>    |
| Shane Sell                       | Sr. Analyst                | 0.0           | 111.0          | 0.0           | <b>111.0</b>   |
| Sheldon Cowlthorpe               | Engineer                   | 0.0           | 0.0            | 0.5           | <b>0.5</b>     |
| <b>TOTAL INSPECTIONS</b>         |                            | 30.50         | 111.00         | 0.50          | <b>142.00</b>  |
| Process/Admin                    |                            |               |                |               |                |
| Jasmine Chapman                  | Customer Service Agent     | 1.0           | 23.0           | 1.0           | <b>25.0</b>    |
| Steve Hunt                       | Director                   | 4.0           | 16.5           | 8.3           | <b>28.8</b>    |
| Sarah Jenks                      | Customer Service Agent     | 60.5          | 489.5          | 67.0          | <b>617.0</b>   |
| Scott Kenaston                   | Sr. Program Manager        | 5.3           | 22.5           | 5.8           | <b>33.5</b>    |
| Dawn Kenney                      | Sr. Program Manager        | 0.0           | 3.0            | 0.0           | <b>3.0</b>     |
| Cindy Marek                      | Sr. Customer Service Agent | 0.0           | 1.0            | 0.0           | <b>1.0</b>     |
| Chris Mutanda                    | Analyst                    | 2.8           | 91.8           | 2.8           | <b>97.3</b>    |
| Alex Nason                       | Marketing Coordinator      | 0.0           | 22.5           | 0.0           | <b>22.5</b>    |
| Terrica Rangel                   | Sr. Analyst                | 2.0           | 36.0           | 2.0           | <b>40.0</b>    |
| Anna Simpson                     | Marketing Coordinator      | 16.0          | 11.5           | 4.5           | <b>32.0</b>    |
| Becky Thompson                   | Sr. Analyst                | 3.0           | 9.5            | 2.5           | <b>15.0</b>    |
| <b>TOTAL PROCESS/ADMIN</b>       |                            | 94.50         | 726.75         | 93.75         | <b>915.00</b>  |
| Management                       |                            |               |                |               |                |
| Dan Dent                         | Director                   | 41.8          | 431.8          | 51.3          | <b>524.8</b>   |
| Federico Kahnlein                | Program Manager            | 17.0          | 206.0          | 23.0          | <b>246.0</b>   |
| Matt Gibbs                       | Principal / VP             | 2.3           | 11.0           | 3.0           | <b>16.3</b>    |
| Lizzy Safranski                  | Sr. Program Manager        | 23.5          | 59.0           | 23.0          | <b>105.5</b>   |
| <b>TOTAL MANAGEMENT</b>          |                            | 84.50         | 707.75         | 100.25        | <b>892.50</b>  |
| <b>TOTAL HOURS</b>               |                            | <b>338.50</b> | <b>5037.00</b> | <b>321.50</b> | <b>5697.00</b> |
| <b>Percent of Total by State</b> |                            | 5.9%          | 88.4%          | 5.6%          | <b>100.0%</b>  |





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