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January 31, 2020

VIA HAND DELIVERY

Ms. Lora W. Johnson, CMC, LMMC
Clerk of Council
City Hall, Room 1E09
1300 Perdido Street
New Orleans, Louisiana 70112

RE: Filing of Entergy New Orleans, LLC's Energy Smart Quarterly Report for the Period of October 1, 2019 to December 31, 2019 (Resolutions R-11-52, R-17-31, R-17-176, R-17-177, R-17-623, R-19-516; UD-08-02, UD-17-03)

Dear Ms. Johnson:

On February 3, 2011, the Council of the City of New Orleans ("Council") adopted Resolution R-11-52 requiring periodic reports regarding Energy Smart to be filed with the Council. A series of Council Resolutions, R-17-31, R-17-176, R-17-177, and R-17-623, approved the continuance of the Energy Smart for Program Years 7-9 with APTIM, Environmental and Infrastructure ("APTIM") as the Third Party Administrator. On December 19, 2019, the Council adopted Resolution R-19-516 extending Energy Smart Program Year 9 ("PY9") by three months through March 31, 2020, and required Entergy New Orleans, LLC to file a Quarterly Report on results of PY9 for the fourth quarter of calendar year 2019.

On behalf of APTIM, Entergy New Orleans, LLC submits the enclosed original and three copies of the Energy Smart Quarterly Report for the period of October 1, 2019 to December 31, 2019. Should you have any questions regarding this filing, please contact my office at (504) 670-3680.

Thank you for your assistance with this matter.

Sincerely,

Brian L. Guillot

01/31/2020

Enclosure

cc: Official Service List UD-08-02 and UD-17-03 (via electronic mail)

RECEIVED
JAN 31 2020
BY:



Quarterly Report

Energy Smart Program
Program Year 9 - Quarter 4
Submitted: 1/31/2020

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Table of Contents

I.	Executive Summary	3
	Staff List.....	4
	Offerings Overview	5
II.	Program Performance & Activity	6
III.	Residential Offerings Summary	11
	Home Performance with ENERGY STAR®	12
	Residential Lighting & Appliances	13
	Multi-Family	14
	Low Income Audit & Weatherization.....	15
	High Efficiency A/C Tune-Up.....	16
	Direct Load Control (EasyCool).....	17
	Green Light New Orleans	18
	School Kits & Education	19
IV.	Behavioral (Scorecard)	20
V.	Commercial and Industrial Programs	22
	Commercial & Industrial Offerings Summary	23
	Small Commercial & Industrial	24
	Large Commercial & Industrial	25
	Publicly Funded Institutions	26
VI.	Marketing, Outreach & Engagement	27
	Marketing and Outreach	28
	Residential Marketing and Outreach Highlights	28
	Community Outreach.....	29
	Commercial Marketing and Outreach Highlights.....	30
VII.	Trade Allies	34
	Program Training.....	37
	Initiatives.....	38
VIII.	Incentive Budget Highlights	41
IX.	Appendices	42
	Appendix A: School Kits & Education Summary	42
	Appendix B: Community Outreach Summary.....	43
	Appendix C: Training and Education	44
	Appendix D: Marketing Collateral	48
	Appendix E: Program Photos	78

Executive Summary

The Energy Smart Program (the “Program”) was developed by the Council for the City of New Orleans (“Council”), is administered by Entergy New Orleans, LLC (“ENO”) and is currently implemented by APTIM (formerly CB&I), the Third-Party Administrator (“TPA”). This report contains data on the Program, including pre-evaluated kWh savings results and other information regarding the New Orleans and Algiers portions of the Program, specific to both the Residential and Commercial offerings. More detailed and complete information, including post-evaluation results, will be provided in the Program Year 9 (“PY9”) Annual Report.

This cycle of the Energy Smart portfolio of offerings was originally planned to run from April 1, 2017 through December 31, 2019. However, in December, the Council decided to extend PY9 so as to allow for more time to consider the plan for implementing future programs. To ensure success in current and future offerings, the Program, led by APTIM, has engaged a number of subcontractors that have extensive experience in energy efficiency offerings in the New Orleans market to implement the Program, including:

- Accelerated Innovations
- Baynham Environmental
- Energy Wise Alliance
- Franklin Energy Services
- Green Coast Enterprises
- Green Light New Orleans
- ILSI Engineering
- Urban League of Louisiana

This report contains data on the Energy Smart Commercial & Industrial and Residential offerings, which span the east bank of New Orleans and Algiers territory. The data includes the following:

- Summary of activity by offering
- kWh savings and incentive spend by offering
- Marketing, outreach and engagement highlights

Program Year 9 is divided into four quarters:

- Quarter 1 (“Q1”): January – March
- Quarter 2 (“Q2”): April – June
- Quarter 3 (“Q3”): July – September
- Quarter 4 (“Q4”): October – December

An emphasis on working collaboratively with ENO, the Council’s Advisors, and numerous stakeholders, including local policy advocacy groups, trade ally contractors and higher education institutions, has been important for the implementation of the Energy Smart program. ENO and APTIM view collaborative teamwork among the large number of stakeholders with diverse interests as a critical component to the overall success of the program.

Staff List

NAME	TITLE	COMPANY	LOCATION
Tom Quasius	TPA Director	APTIM	Chicago, IL
Kristin McKee	Program Director	APTIM	New Orleans, LA
Dawn Ellerd	Marketing & Outreach Lead	APTIM	New Orleans, LA
Kevin Fitzwilliam	Training & Development Specialist	APTIM	New Orleans, LA
Spencer Kurtz	Energy Engineer	APTIM	Charlotte, NC
Mobuayo Pedro-Egbe	Energy Engineer	APTIM	New Orleans, LA
Philip Russo	Trade Ally Liaison	APTIM	New Orleans, LA
Tamzen Jenkins	Marketing & Communications Specialist	APTIM	New Orleans, LA
Michael Slaughter	Finance	APTIM	Baton Rouge, LA
Keeley Evans	Commercial Project Coordinator	ILSI Engineering	New Orleans, LA
Jackie Dadakis	Chief Operating Officer	Green Coast Enterprises	New Orleans, LA
Joe Ryan	Director of Energy Services	Green Coast Enterprises	New Orleans, LA
Jared Sessum	Commercial Energy Manager	Green Coast Enterprises	New Orleans, LA
Josh Kruebbe	Residential QA/QC	Baynham Environmental	New Orleans, LA
Jacob Pohlman	Residential QA/QC	Baynham Environmental	New Orleans, LA
Carl Funches	Field Technician DR	Baynham Environmental	New Orleans, LA
Tori Briscoe	Field Technician DR	Banham Environmental	New Orleans, LA
Nate Wolf	Residential Program Manager	Franklin Energy Services	New Orleans, LA
Alan Mitchell	Operations Manager	Franklin Energy Services	New Orleans, LA
Karen O'Brien	Program Manager, Special Projects	Franklin Energy Services	New Orleans, LA
Katie Mueller	Senior Regional Marketing Manager	Franklin Energy Services	Mequon, WI
Brady Loomis	Senior Marketing Specialist	Franklin Energy Services	Port Washington, WI
Atom Davis	Trade Ally Liaison	Franklin Energy Services	New Orleans, LA
Raven Carr	Operations Analyst	Franklin Energy Services	New Orleans, LA
Bernadelle Tilus	Project Specialist	Franklin Energy Services	New Orleans, LA
Daniel Franklin	Energy Advisor	Franklin Energy Services	New Orleans, LA
James Herman	Energy Advisor	Franklin Energy Services	New Orleans, LA
James Phillips	Energy Advisor	Franklin Energy Services	New Orleans, LA
Dwayne Haley	Energy Advisor	Franklin Energy Services	New Orleans, LA
Jamie Wine	School Kits & Education Director	Energy Wise Alliance	New Orleans, LA
Emily Snyder	School Kits, Education Manger	Energy Wise Alliance	New Orleans, LA
Kevin Kellup	School Kits, Education Coordinator	Energy Wise Alliance	New Orleans, LA
Brandon Muetzel	Community Outreach Manager	Energy Wise Alliance	New Orleans, LA
Andreas Hoffman	Green Light Direct Install	Green Light New Orleans	New Orleans, LA
Zach Carlsen	Scorecard Project Manager	Accelerated Innovations	St. Paul, MN

Offerings Overview

Residential

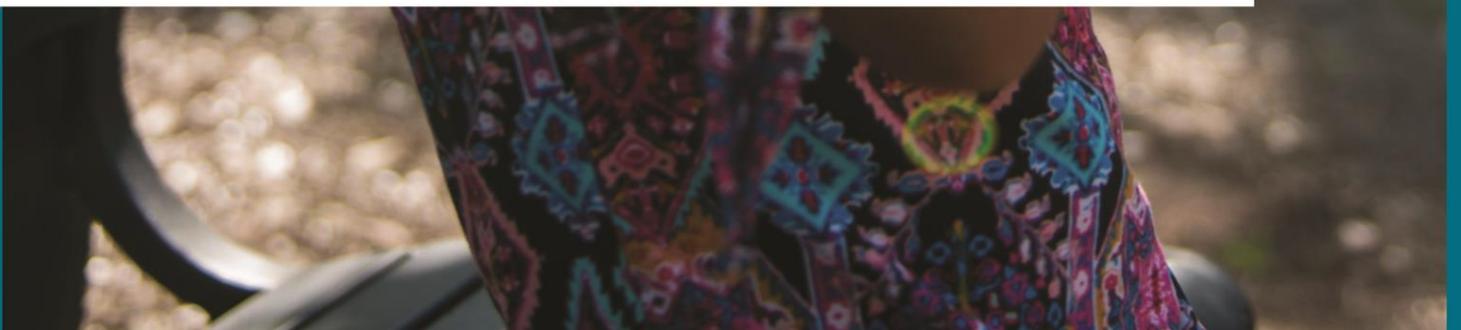
- Home Performance with ENERGY STAR®
- Residential Lighting & Appliances
- Low Income Audit & Weatherization
- High Efficiency Tune Up
- Multi-Family
- Direct Load Control (EasyCool)
- School Kits & Education
- Green Light Direct Install
- Behavioral (Scorecard)

Commercial & Industrial

- Small Commercial Solutions
- Large Commercial & Industrial Solutions
- Publicly Funded Institutions



PROGRAM PERFORMANCE & ACTIVITY



Program Performance and Activity

Table 1.1

	kWh SAVINGS	kWh GOAL*	% TO kWh GOAL	KW SAVINGS	KW TARGET*	% TO KW TARGET	INCENTIVE SPENT	INCENTIVE BUDGET	% OF BUDGET
Algiers – Commercial**	1,741,272	1,583,737	109.95%	114.90	263.50	43.61%	\$174,964	\$290,502	60.23%
Algiers – Residential**	1,078,758	888,672	121.39%	278.14	269.77	103.10%	\$217,197	\$277,161	78.36%
Algiers – Behavioral***	-	1,155,879	0.00%	-	982.50	0.00%	\$-	\$-	0.00%
N.O. - Commercial	23,335,230	32,893,541	70.94%	2,044.24	5,443.10	37.56%	\$2,482,753	\$5,028,914	49.37%
N.O. - Residential	12,399,921	10,528,443	117.78%	3,169.81	3,428.25	92.46%	\$2,009,583	\$2,432,091	82.63%
N.O. – Behavioral***	-	6,844,121	0.00%	-	5,817.50	0.00%	\$-	\$-	0.00%
TOTAL	38,555,181	53,894,393	71.54%	5,607.09	16,204.62	34.60%	\$4,884,497	\$8,028,668	60.84%

Table 1.2

	NON-INCENTIVE SPENT	NON-INCENTIVE BUDGET	% OF NON-INCENTIVE BUDGET
Commercial	\$2,283,742	\$2,882,142	79.24%
Residential	\$2,162,794	\$2,433,813	88.86%
Behavioral	\$75,000	\$326,747	22.95%
TOTAL	\$4,521,536	\$5,642,702	80.13%

Table 1.3

EM&V SPENT	EM&V BUDGET	% OF EM&V BUDGET
\$436,195	\$936,893	49.44%

*Goals are reflective of the Supplemental and Amended Energy Smart Implementation Plan PY 7 – 9, approved 12/14/2017. Summary tables show savings and incentive spend from January 1st through December 31st, 2019.

**Algiers budget reflective of increases authorized per Letter from Council Chair Helena Moreno to Brian L. Guillot dated October 4, 2019 and referenced in Resolution R-19-516.

***Behavioral program results are determined and evaluated after completion of the program year.

Residential Summary

The Energy Smart Residential Portfolio performed successfully in Q4. Trade ally engagement, program marketing, community outreach, quality control and direct installation all continued to drive production and ensure quality work for Entergy New Orleans Customers. At the close of Q4, the Residential portfolios for both Algiers and New Orleans territories had exceeded kWh savings targets for PY9. In late December the Program announced that Program Year 9 (PY9) was being extended an additional three months, through March 31, 2020.

The Energy Smart team continued to focus on engagement with relevant community organizations. In Q4, Energy Smart expanded upon its existing partnership with Total Community Action, Inc. (TCA) by supporting a new joint initiative from Entergy New Orleans and TCA, called Total Power. This new initiative aims to help customers become more financially independent. Participation in the the Low-Income Weatherization offering is required for participation in the TCA/ Entergy-sponsored program. The Energy Smart team also continued to engage with the Finance Authority of New Orleans (FANO) in development of their “Green Mortgage” program. Through this new program, Energy Smart will support FANO through whole-home assessments, identification of energy savings opportunities.

The Energy Smart team has established a good practice of quarterly trainings and Trade Ally Advisory Group meetings. These meetings allow for the exchange of feedback between trade allies and the Energy Smart team, the dissemination of program updates and the fostering of deeper relationships with trade allies. This practice was commended by the Department of Energy when the Home Performance with ENERGY STAR[®] offering was under sponsorship review. Energy Smart’s deep trade ally engagement was a takeaway that the DOE plans to share with other HPwES sponsored programs as a “best practice.”

Commercial & Industrial Summary

The Energy Smart Commercial and Industrial offerings continued to perform well through Q4 due to continued targeted marketing, outreach, and trade ally training and recruitment efforts that drove substantial production and project pipeline development. In November, Energy Smart released a custom incentive bonus to drive production and encourage earlier completion of projects.

Commercial and Industrial marketing and outreach efforts in Q4 focused on targeting customers in key segments. Marketing efforts included print ads, digital marketing, program communications, and dedicated meetings with key customers and trade allies. Energy Smart launched a Small Business Direct Install (SBDI) offering that is designed to address barriers that small commercial customers face by offering enhanced incentives to cover a greater portion of the project cost. The Energy Smart team continued to promote the Retro-commissioning (RCx) offering, which resulted in four new projects, including three City of New Orleans RCx projects.

In November, the Energy Smart team released an incentive bonus for all new custom projects received, with the stipulation that they must finish installation in Program Year 9 to be eligible for the increased incentive. The goal of this bonus was to drive as much production as possible by making custom incentives more appealing to customers and trade allies and creating a sense of urgency to complete those projects in PY9.

The Energy Smart team continued to recruit new trade allies and continued to offer a robust training calendar in Q4 which further helped to develop the knowledge and skill set of participating contractors. During Q4, the Energy Smart team recruited 10 new Trade Allies, held 27 trainings or events and

facilitated introductions between trade allies and representatives of four local workforce development agencies. The Energy Smart team was invited by its partner the Urban League of Louisiana to present at two of their main events during Q4 – Women in Construction Convening and Opportunities Outlook for Disadvantaged Business Enterprises (DBEs) in Construction.

The Commercial and Industrial Portfolio concluded Q4 with substantial progress to savings goals and a healthy pipeline that will carry into the new year. The Program announced to trade allies in late December that Program Year 9 was being extended an additional three months and that the custom incentive bonus would remain in place through the extension period.



RESIDENTIAL OFFERINGS



Residential Offerings Summary

Table 2.1

RESIDENTIAL OFFERINGS	kWh SAVINGS	kWh GOAL*	% TO SAVINGS GOAL	kW SAVINGS	kW TARGET*	% TO kW TARGET	INCENTIVE SPENT	INCENTIVE BUDGET	% OF BUDGET
Algiers – Home Performance**	375,520	214,789	174.83%	97.93	42.70	229.35%	\$86,518	\$100,051	86.47%
Algiers – Retail Lighting & Appliance	223,605	250,986	89.09%	43.97	53.40	82.33%	\$15,127	\$27,596	54.82%
Algiers – Multi-Family	56,108	53,717	104.45%	11.23	10.30	109.04%	\$11,841	\$15,664	75.60%
Algiers – Low Income**	86,874	98,072	88.58%	31.10	21.10	147.39%	\$44,843	\$46,561	96.31%
Algiers – High Efficiency Tune Ups**	251,751	134,413	187.30%	83.66	40.40	207.07%	\$42,151	\$50,912	82.79%
Algiers – DLC	-	-	0.00%	-	83.27	0.00%	\$5,920	\$12,040	49.17%
Algiers – School Kits	82,553	136,695	60.39%	9.77	18.6	52.53%	\$10,572	\$23,800	44.42%
Algiers – Scorecard***	-	1,155,879	0.00%	-	982.5	0.00%	\$-	\$-	0.00%
Algiers & N.O. – Green Light**	23,929	-	0.00%	4.95	-	0.00%	\$2,306	\$79,144	2.91%
N.O. – Home Performance	2,090,346	2,863,506	73.00%	539.80	571.84	94.40%	\$478,489	\$754,811	63.39%
N.O. – Retail Lighting & Appliance	5,139,107	3,357,145	153.08%	1,071.12	711.45	150.56%	\$294,671	\$366,435	80.42%
N.O. – Multi-Family	1,188,362	717,509	165.62%	258.45	138.03	187.24%	\$204,683	\$197,737	103.51%
N.O. – Low Income	1,191,025	1,316,362	90.48%	554.42	285.11	194.46%	\$537,819	\$452,430	118.87%
N.O. – High Efficiency Tune Ups	2,035,852	1,727,139	117.87%	654.73	541.09	121.00%	\$337,970	\$326,911	103.38%
N.O. – DLC	-	-	0.00%	-	1,106.23	0.00%	\$60,000	\$159,960	37.51%
N.O. – School Kits	733,647	546,782	134.18%	86.83	74.5	116.55%	\$93,869	\$95,200	98.60%
N.O. – Scorecard***	-	6,844,121	0.00%	-	5,817.5	0.00%	\$-	\$-	0.00%
TOTAL	13,478,679	19,417,115	69.42%	3,447.95	10,498.02	32.84%	\$2,226,780	\$2,709,252	82.19%

*Goals are reflective of the Supplemental and Amended Energy Smart Implementation Plan PY 7 – 9, approved 12/14/2017. Summary tables show savings and incentive spend from January 1st through December 31st, 2019.

**Algiers budget reflective of increases authorized per Letter from Council Chair Helena Moreno to Brian L. Guillot dated October 4, 2019 and referenced in Resolution R-19-516.

***Behavioral program results are determined and evaluated after completion of the program year.

Home Performance with ENERGY STAR®

Offering Highlights

The Home Performance with ENERGY STAR offering had 235 participants and a total of 1,270 kits were shipped to customers in Q4. Referrals from trade allies, online marketing and community outreach activities continued to play pivotal roles in generating requests for home assessments.

The Home Performance with ENERGY STAR offering was reviewed by the Department of Energy (DOE) for compliance with sponsorship standards and to gather best practices. The offering was found to be well within qualifications for the HPwES standards. One large takeaway from the DOE review was the value of the quarterly Trade Ally Advisory Group meetings, training opportunities, program communications and regular field trainings with trade allies. The DOE will be evaluating this as a best practice for other programs throughout the country.

New Orleans:

- A total of 718 measures were installed during the fourth quarter of PY9.
- The offering reached 73.00% of the kWh goal, achieving 2,090,346 kWh.
- The offering reached 94.40% of the kW target, achieving 539.80 kW.

Algiers:

- A total of 61 measures were installed during the fourth quarter of PY9.
- The offering reached 174.83% of the kWh goal, achieving 375,520 kWh.
- The offering reached 229.35% of the kW target, achieving 97.93 kW.

Residential Lighting & Appliances

Offering Highlights

The Residential Lighting & Appliance offering exceeded goal in New Orleans and experienced higher participation in Algiers, relative to previous years, in Q4. The Energy Smart team continued to focus on cost-effectiveness and increasing energy savings achievement. Retail sales continued at a steady pace, resulting in almost 25% of the savings goal for the year sold in the New Orleans territory in Q4 and around 14% of the savings goal for the year sold in Algiers.

Home Depot, Walmart and the Green Project continued to lead the way in lighting sales. Home Depot and The Green Project grossed around 93% of the sales in New Orleans. In Algiers, Walmart remained the largest retailer, bringing in around 96% of the districts sales in Q4 through LEDvance and Signify lighting products.

In addition to the in-store lighting products, the Energy Smart team also continued the promotion of ENERGY STAR heat pump water heaters, pool pumps, refrigerators, and window A/C unit rebates, with over \$1,000 in rebate incentive dollars distributed to customers for savings of nearly 7,000 kWh.

New Orleans:

- A total of 992 measures were installed during the fourth quarter of PY9.
- The offering reached 153.08% of the kWh goal, achieving 5,139,107 kWh.
- The offering reached 150.56% of the kW target, achieving 1,071.12 kW.

Algiers:

- A total of 37 measures were installed during the fourth quarter of PY9.
- The offering reached 89.09% of the kWh goal, achieving 223,605 kWh.
- The offering reached 82.33% of the kW target, achieving 43.97 kW.

Table 2.2: Participating Retailers Participating Retailers

RETAIL COMPANY	SUPPORTED RETAIL PROGRAMS		ADDRESS
	Lighting	Appliances	
Barto Appliance		X	1400 Airline Dr
Costco Wholesale		X	3900 Dublin St
Dollar General (Algiers)	X		3620 MacArthur Blvd
Dollar Tree (Algiers)	X		3771 General DeGaulle Dr
Dollar Tree (Donna Villa Shopping Center)	X		9671 Chef Menteur Hwy
Dollar Tree (Gentilly Retail Center)	X		4242 Chef Menteur Hwy
Dollar Tree (Morrison)	X		11701 Morrison Rd
Dollar Tree (Navarre)	X		5201 Canal Blvd
Dollar Tree (Tulane/Carrollton)	X		4115 S Carrollton Ave
Home Depot (Bullard)	X	X	12300 I-10 Service Rd
Home Depot (Central)	X	X	1100 S Claiborne Ave
Lowe's (Central)		X	2501 Elysian Fields Ave
Lowe's (Read)		X	5770 Read Blvd
The Green Project	X		2831 Marais St
Walmart (Behrman)	X	X	4001 Behrman Pl
Walmart (Bullard)		X	6000 Bullard Ave
Walmart (Chef Menteur)		X	4301 Chef Menteur Hwy

Multi-Family

Offering Highlights

The Multi-Family offering overwhelmingly exceeded goals in 2019. During Q4, the New Orleans territory completed nearly 10% of savings goals and Algiers achieved over 89% of the savings goal. Trade ally engagement was a major contributing factor to the success of the Multi-Family offering. The Energy Smart team will continue to leverage trade allies and seek out larger properties to drive energy savings achievement.

New Orleans:

- A total of 123 measures were installed during the fourth quarter of PY9.
- The offering reached 165.62% of the kWh goal, achieving 1,188,362 kWh.
- The offering reached 187.24% of the kW target, achieving 258.45 kW.

Algiers:

- A total of 138 measures were installed during the fourth quarter of PY9.
- The offering reached 104.45% of the kWh goal, achieving 56,108 kWh.
- The offering reached 109.04% of the kW target, achieving 11.23 kW.

Low Income Audit & Weatherization

Offering Highlights

The Low-Income Audit and Weatherization offering completed over 33% of the savings goals in New Orleans and over 34% of savings goals in Algiers in Q4. Additionally, Energy Smart expanded upon its existing partnership with Total Community Action, Inc. (TCA) by supporting a new joint initiative from Entergy New Orleans and TCA, called Total Power. This new initiative aims to help customers that struggle with financial independence. The Low-Income Weatherization offering is required for participation in the TCA/ Entergy sponsored program.

New Orleans:

- A total of 665 measures were installed during the fourth quarter of PY9.
- The offering reached 90.48% of the kWh goal, achieving 1,316,362 kWh.
- The offering reached 194.46% of the kW target, achieving 554.42 kW.

Algiers:

- A total of 70 measures were installed during the fourth quarter of PY9.
- The offering reached 88.58% of the kWh goal, achieving 86,874 kWh.
- The offering reached 147.39% of the kW target, achieving 31.10 kW.

High Efficiency A/C Tune-Up

Offering Highlights

The High Efficiency A/C Tune-Up offering met in Q3 and due to the seasonality of the offering there was minimal activity in Q4. Over 8% of the New Orleans savings goals were achieved in Q4. There was no activity in Algiers in Q4. The Energy Smart team held a trade ally training in October that focused on the technical aspects of properly air sealing and duct sealing a home for technicians and crew leads. This training focused on the ways to perform services correctly to ensure that work performed is long-lasting and safe for the home, which will result in higher quality work for the AC Tune-Up offering.

New Orleans:

- A total of 111 measures were installed during the fourth quarter of PY9.
- The offering reached 117.87% of the kWh goal, achieving 2,035,852 kWh.
- The offering reached 121.00% of the kW target, achieving 654.73 kW.

Algiers:

- No measures were installed during the fourth quarter of PY9.
- The offering reached 187.30% of the kWh goal, achieving 251,751 kWh.
- The offering reached 207.07% of the kW target, achieving 83.66 kW.

Table 2.3: A/C Tune-up Q1 2019 Email Campaigns

AD NAME	SENT TO	OPEN RATE	CTR
Energy Smart A/C Tune-up Satisfaction Survey	406	30.6%	22.6%
TA February Newsletter: Checklist for Success in 2019	73	50%	34.3%

Direct Load Control (EasyCool)

Offering Highlights

The PY9 annual participation incentive payments were issued to participating customers in Q4. A total of 1,969 switches were installed through the end of Q4 and \$65,920 in incentives were paid to participating customers. The Energy Smart team continued to support and address any customer service requests from customers with active installed switches. With the closing of Cycling Season (June-Sept) in Q3, there were no events conducted during Q4.

New Orleans:

- A total of 1,788 were installed through the fourth quarter of PY9.
- A total of \$60,000 in incentives were paid to participating customers in Q4.

Algiers:

- A total of 181 switches were installed through the fourth quarter of PY9.
- A total of \$5,920 in incentives were paid to participating customers in Q4.

Table 2.4: EasyCool Q1 2019 Facebook Campaigns

AD NAME	IMPRESSIONS	CLICKS	CTR	AVG. CPC
EasyCool March	15,305	239	1.56%	\$.93

Table 2.5: EasyCool Q1 2019 Customer Satisfaction Surveys

AD NAME	SENT TO	OPEN RATE	CTR
Energy Smart EasyCool Satisfaction Survey	465	57%	40.9%

Green Light New Orleans

Offering Highlights

The Green Light New Orleans offering continued to utilize volunteers to install energy efficient light bulbs in residential properties. Through the end of Q4, the offering installed 1,048 light bulbs of which 92% were compact fluorescent lights and 8% were LEDs.

New Orleans:

- A total of 946 light bulbs were installed through the fourth quarter of PY9.
- The offering achieved 21,583 kWh.
- The offering achieved 4.46 kW.

Algiers:

- A total of 102 light bulbs were installed through the fourth quarter of PY9.
- The offering achieved 2,347 kWh.
- The offering achieved 0.48 kW.

Green Light installed 1,048 light bulbs, of which 965 were CFLs and 83 were LEDs.

Table 2.6

Territory	Lamps	CFLs	LEDs
New Orleans	946	889	57
Algiers	102	76	26
Total	1,048	965	83

School Kits & Education

Offering Highlights

During Q4, the Energy Smart team delivered 1,095 school kits to 12 schools in grades 6, 7, 8 and 10 that were located in City Council Districts A, B, C and E. Of those kits, 150 were delivered in Algiers at LB Landry – OP Walker College and Career Preparatory High School. At the close of the 2019 calendar year, the Energy Smart team delivered a total of 3,500 kits to students.

During Q4, the Energy Smart team unveiled a new in-class activity for high school students to encourage critical thinking about energy decision-making and energy efficiency's role in their lives. The team also partnered with the Youth Program Quality Intervention (YPQI) study to help improve learning experiences and classroom practices. Through the study, the Energy Smart team is making small process changes to ensure delivery of the highest quality youth programming with outcomes that are most impactful to students. Additionally, teachers, like Ms. Deruise at St. Rita Catholic School, gave testimonials showing that the Energy Smart schools programming was helpful, empowering and engaging.

“The students seem to love this program which does seem to empower them to explore the everyday energy uses in their homes and the environment. This program will really be helpful when we are studying the unit on energy, power, and the environment further into the school year. (PS Love the program and presentation. The presenter was very engaged with the students, as they were with him.)”

–Ms. Deruise, Teacher at Saint Rita Catholic School

New Orleans:

- A total of 945 kits were distributed during the fourth quarter of PY9.
- The offering reached 134.18% of the kWh goal, achieving 733,647 kWh.
- The offering reached 116.55% of the kW target, achieving 86.83 kW.

Algiers:

- A total of 150 kits were distributed during the fourth quarter of PY9.
- The offering reached 60.39% of the kWh goal, achieving 82,553 kWh.
- The offering reached 52.53% of the kW target, achieving 9.77 kW.

Behavioral (Scorecard)

Offering Highlights

The Energy Smart Scorecard offering progressed through Q4 2019 without substantial modification. The open rates for Scorecards in Q4 continued to be above 30%, which is a trend that began at the start of Q3.

Scorecard sends were paused temporarily at the end of Q3/beginning of Q4 to ensure that proper data was being recorded and sent to customers who received a new AMI meter in the middle of their billing cycle. For example, if the first part of the customer bill was data from their original meter and the second part was data from the newly installed meter, the Scorecard needed to aggregate that data. This aggregation was done successfully. In all other areas, Q4 Scorecards were sent on schedule without issue.

Delivery Metrics

Following are the delivery metrics of the distribution of Scorecards each week starting on the first week of the Q4 period in October through the end of December 2019.

Table 3.1

SEND DATE	TYPE	COUNT	% OF SEND
12/27/2019	Send	16330	100
	Delivery	15560	95.28
	Open	5613	34.37
	Click	55	0.34
	Bounce	839	5.14
	Complaint	1	0.01
	Unsubscribe	4	0.02
12/13/2019	Send	61198	100
	Delivery	57122	93.34
	Open	14983	24.48
	Click	234	0.38
	Bounce	4282	7
	Complaint	9	0.01
	Unsubscribe	3	0
11/22/2019	Send	20923	100
	Delivery	19161	91.58
	Open	6793	32.47
	Click	86	0.41
	Bounce	1821	8.7
	Complaint	2	0.01
	Unsubscribe	0	0
11/15/2019	Send	22949	100
	Delivery	21669	94.42

	Open	7088	30.89
	Click	58	0.25
	Bounce	1334	5.81
	Unsubscribe	80	0.35
11/8/2019	Send	64002	100
	Delivery	59745	93.35
	Open	17849	27.89
	Click	180	0.28
	Bounce	4411	6.89
	Complaint	7	0.01
	Unsubscribe	0	0
10/25/2019	Send	72426	100
	Delivery	68102	94.03
	Open	22995	31.75
	Click	248	0.34
	Bounce	4509	6.23
	Complaint	12	0.02
	Unsubscribe	0	0
10/18/2019	Send	310	100
	Delivery	297	95.81
	Open	100	32.26
	Click	1	0.32
	Bounce	14	4.52
	Complaint	0	0
	Unsubscribe	0	0
10/11/2019	Send	30234	100
	Delivery	28378	93.86
	Open	11122	36.79
	Click	210	0.69
	Bounce	1963	6.49
	Complaint	4	0.01
	Unsubscribe	0	0



COMMERCIAL & INDUSTRIAL OFFERINGS



Commercial & Industrial Offerings Summary

Table 4.1

COMMERCIAL & INDUSTRIAL	KWH SAVINGS	KWH GOAL*	% TO SAVINGS GOAL	KW SAVINGS	KW TARGET*	% TO KW TARGET	ACTUAL INCENTIVE SPENT	INCENTIVE BUDGET	% OF BUDGET
Algiers – Small C&I	378,935	535,678	70.74%	51.80	107.60	48.14%	\$32,219	\$105,675	30.49%
Algiers - Large C&I**	1,117,468	797,046	140.20%	54.70	117.40	46.60%	\$113,930	\$132,962	85.69%
Algiers – PFI**	244,869	251,013	97.55%	8.40	38.50	21.81%	\$28,815	\$51,865	55.56%
N.O. – Small C&I	6,198,327	5,760,033	107.61%	711.81	1,098.10	64.82%	\$736,961	\$1,136,305	64.86%
N.O. - Large C&I	16,685,255	24,205,586	68.93%	1,299.39	3,914.80	33.19%	\$1,691,729	\$3,445,727	49.10%
N.O. – PFI	451,648	2,927,922	15.43%	33.04	430.20	7.68%	\$54,062	\$446,882	12.10%
TOTAL	25,076,502	34,477,278	72.73%	2,159.14	5,706.60	37.84%	\$2,657,717	\$5,319,416	49.96%

*Goals are reflective of the Supplemental and Amended Energy Smart Implementation Plan PY 7 – 9, approved 12/14/2017. Summary tables show savings and incentive spend from January 1st through December 31st, 2019.

**Algiers budget reflective of increases authorized per Letter from Council Chair Helena Moreno to Brian L. Guillot dated October 4, 2019 and referenced in Resolution R-19-516.

Small Commercial & Industrial

Offering Highlights

The Small Commercial and Industrial offering achieved 6,577,262 kWh through Q4, with 6,198,327 kWh completed in New Orleans and 378,935 kWh in Algiers. A total of 3,019,933 kWh closed in the fourth quarter. Through Q4, the Small Commercial offering has an estimated 8 million kWh in the pipeline for PY9, with the majority being within the New Orleans territory. The Small Commercial and Industrial offering added over 1 million kWh to the pipeline in Q4 alone. The Energy Smart team continues to see results from marketing and outreach strategies to both customers and trade allies. Additionally, Energy Smart launched a Small Business Direct Install (SBDI) offering that is designed to address barriers that small commercial customers face by offering enhanced incentives to cover a greater portion of the project cost. The Energy Smart team will evaluate the initial performance of the SBDI offering and look for ways to increase cost-effectiveness and identify opportunities to streamline participation.

In November, the Energy Smart team released an incentive bonus of \$0.03/kWh for all new custom projects received, with the stipulation that they must finish installation in PY9 to be eligible for the increased incentive. The goal of this bonus was to drive as much production as possible by making custom incentives more appealing to customers and trade allies and creating a sense of urgency to complete those projects in PY9. In late December, the Program announced that PY9 would be extended three months and that the custom incentive bonus would remain in place through the extension period.

New Orleans:

- A total of 40 projects were completed during the fourth quarter of PY9.
- The offering reached 107.61% of the kWh goal, achieving 6,198,327 kWh.
- The offering reached 64.82% of the kW target, achieving 711.81 kW.

Algiers:

- A total of 9 projects were completed during the fourth quarter of PY9.
- The offering reached 70.74% of the kWh goal, achieving 378,935 kWh.
- The offering reached 48.14% of the kW target, achieving 51.80 kW.

Table 4.2

New Orleans

PROJECT TYPE	COUNT OF MEASURES	TOTAL GROSS SAVINGS (KWH)	TOTAL INCENTIVES
Custom Lighting	126	2,741,874	\$329,734
Prescriptive	13	38,570	\$4,083
SBDI	2	19,512	\$4,155
Total	141	2,799,956	\$337,972

Algiers

PROJECT TYPE	COUNT OF MEASURES	TOTAL GROSS SAVINGS (KWH)	TOTAL INCENTIVES
Custom Lighting	26	209,455	\$25,906
Prescriptive	4	7,976	\$540
SBDI	1	2,547	\$544
Total	31	219,978	\$26,990

Large Commercial & Industrial

Offering Highlights

The Large Commercial and Industrial offering completed 17,802,723 kWh through Q4, with 16,685,255 kWh completed in New Orleans and 1,117,468 kWh in Algiers. A total of 7,772,716 kWh closed in the fourth quarter. Through Q4, the Large Commercial and Industrial offering has an estimated 25 million kWh in the pipeline for PY9, with about 90% of the savings in New Orleans and 10% in Algiers. The Large Commercial and Industrial offering saw great results from marketing segmentation, targeted customer outreach, training opportunities and trade ally engagement strategies throughout the year that directly contributed to pipeline growth. Direct outreach in Algiers has contributed to healthy pipeline development for that territory which has already completed 140% of the goal while remaining within budget.

The Energy Smart team also received four new Retro-commissioning project applications in Q4 and will continue to implement a variety of strategies to engage the market and increase production in 2020.

In November, the Energy Smart team released an incentive bonus of \$0.03/kWh for all new custom projects received, with the stipulation that they must finish installation in PY9 to be eligible for the increased incentive. The goal of this bonus was to drive as much production as possible by making custom incentives more appealing to customers and trade allies and creating a sense of urgency to complete those projects in PY9. In late December, the Program announced that PY9 would be extended three months and that the custom incentive bonus would remain in place throughout the extension period.

New Orleans:

- A total of 39 projects were implemented during the fourth quarter of PY9.
- The offering reached 68.93% of the kWh goal, achieving 16,685,255 kWh.
- The offering reached 33.19% of the kW target, achieving 1,299.39 kW.

Algiers:

- A total of 1 project was implemented during the fourth quarter of PY9.
- The offering reached 140.20% of the kWh goal, achieving 1,117,468 kWh.
- The offering reached 46.60% of the kW target, achieving 54.70 kW.

Table 4.3

New Orleans

PROJECT TYPE	COUNT OF MEASURES	TOTAL GROSS SAVINGS (KWH)	TOTAL INCENTIVES
Custom Lighting	147	3,948,409	\$396,373
Custom Non-Lighting	13	3,158,173	\$370,291
Prescriptive	8	95,528	\$9,952
Total	168	7,202,110	\$776,616

Algiers

PROJECT TYPE	COUNT OF MEASURES	TOTAL GROSS SAVINGS (KWH)	TOTAL INCENTIVES
Custom Non-Lighting	1	570,607	\$63,930
Total	1	570,607	\$63,930

Publicly Funded Institutions

Offering Highlights

The Publicly Funded Institutions offering completed 696,517 kWh through Q4, with 451,648 kWh completed in New Orleans and 244,869 kWh completed in Algiers. A total of 424,747 kWh closed in the fourth quarter. Through Q4, the Publicly Funded Institutions offering has an estimated 2.6 million kWh in the pipeline for PY9 with about 95% of the savings in New Orleans and about 5% in Algiers, resulting in a healthy forecast for both territories. The Energy Smart team continues to work with existing partners to identify opportunities within this sector such as with City of New Orleans facilities, K-12 schools and public higher education institutions. The team will continue to support customers through identifying energy savings opportunities and assistance with the application process.

In November, the Energy Smart team released an incentive bonus of \$0.03/kWh for all new custom projects received, with the stipulation that they must finish installation in PY9 to be eligible for the increased incentive. The goal of this bonus was to drive as much production as possible by making custom incentives more appealing to customers and trade allies and creating a sense of urgency to complete those projects in PY9. In late December, the Program announced that PY9 would be extended three months and that the custom incentive bonus would remain in place through the extension period.

New Orleans:

- A total of 2 projects were implemented during the fourth quarter of PY9.
- The offering reached 15.43% of the kWh goal, achieving 451,468 kWh.
- The offering reached 7.68% of the kW target, achieving 33.04 kW.

Algiers:

- A total of 1 project was implemented during the fourth quarter of PY9.
- The offering reached 97.55% of the kWh goal, achieving 244,869 kWh.
- The offering reached 21.81% of the kW target, achieving 8.40 kW.

Table 4.4:

New Orleans

PROJECT TYPE	COUNT OF MEASURES	TOTAL GROSS SAVINGS (KWH)	TOTAL INCENTIVES
Custom Lighting	4	179,878	\$22,592
Total	4	179,878	\$22,592

Algiers

PROJECT TYPE	COUNT OF MEASURES	TOTAL GROSS SAVINGS (KWH)	TOTAL INCENTIVES
Custom Lighting	6	239,523	\$28,743
Prescriptive	1	5,346	\$72
Total	1	244,869	\$28,815



MARKETING, OUTREACH & ENGAGEMENT

Marketing and Outreach

Residential Marketing and Outreach Highlights

In Q4, the Energy Smart team focused on closing the EasyCool offering following cycling season and promoting Home Performance with ENERGY STAR®. Participating EasyCool customers received their end of season letter and incentive in October. The Energy Smart team implemented an email reach-back campaign in October for customers who received an Energy Efficiency Kit previously but had not yet participated in the Home Performance with ENERGY STAR offering. This email campaign resulted in a 30.6% open rate and an 11% click through rate. The Energy Smart team also developed a table-top sign to promote smart thermostats through a raffle at local events.

Starting on November 6, the Energy Smart team launched a digital campaign for the Home Performance with ENERGY STAR offering that included an email, Facebook ad, Google Display ads and Google Search ads. The audiences for the Facebook ad and email were built around the list of customers who opted-in for email and had not yet participated in the offering. The email was sent on November 12 and received a 22% open rate. From this campaign, the Energy Smart team received 97 enrollments from a total of 558 visits to the page, which equates to a 17.4% conversion rate.

The Energy Smart team began to offer smart thermostats to customers with both gas and electric heat in late 2019. To begin promoting this new offering, the Energy Smart team executed a nurture campaign targeting customers with gas-heated homes who had previously participated in the Home Performance with ENERGY STAR or the Low Income Weatherization offerings. These customers received an initial email with a call to action to call to schedule their installation appointment. Three business days later, the customers who had opened the first email received a second email reminding them to schedule their appointment. The open rate on the first email was 14.9% and the open rate was 32.7% for the second email. These nurture campaigns continue to perform well by offering multiple touchpoints and opportunities for the customer to participate. The Energy Smart team plans to use this tactic in future campaigns.

Following the announcement of the PY9 extension, the team began developing a Google Ad retargeting campaign for Home Performance with ENERGY STAR. This will target customers who visited the enrollment page but did not complete the enrollment form.

Table 5.1: Q4 2019 Marketing Tactical Calendar

TACTIC	TIMING	OFFERING
E-Circuit Newsletter	October	Residential Lighting and Appliance, HPwES
EasyCool End of Season Letters	October	EasyCool
HPwES Kit Email	October	HPwES/ Kits
E-Circuit Newsletter	November	Appliance Rebates
HPwES Email	November	HPwES
Smart Thermostat Email	December	EasyCool
HPwES Digital Campaign	Nov. 6 – Dec. 20	HPwES
E-Circuit Newsletter	December	Retail Lighting, Appliance Rebates

Table 5.2 Q4 2019 Circuit Newsletter Metrics

MONTH	OCTOBER	NOVEMBER	DECEMBER
Scheduled Recipients	96,711	96,418	9,285
Delivery Rate	99.14%	99.52%	98.35%
Open Rate (Newsletter Interest)	21.55%	24.58%	23.28%
Click-to-Open Rate (Detailed Content Interest)	6.47%	11.64%	7.27%
Total Clicks	1,666	3,240	2,045
Unique Clicks	1,337	2,745	1,618
Click Rate	1.39%	2.86%	1.69%
Ranked Link	3rd	4th	6th

Community Outreach

In Q4, the Energy Smart team focused on increasing residential customer awareness and engaging customers through residents' active participation in third party clubs, organizations and associations. The Energy Smart team presented or tabled at 39 community events, in all New Orleans City Council Districts in both New Orleans and Algiers. The Energy Smart Program was visible to approximately 9,500 event participants. Through these events, the Energy Smart team engaged in 1,013 individual conversations about the program and generated 113 project leads.

The community outreach focus for Q4 was recurring tabling at the Entergy Customer Care Center, smaller workshops and luncheons with community groups and attending at least one large event per month, such as STEM FEST at the Superdome. At each event, there were dozens to thousands of civic-minded, engaged citizens. By talking to people where they are, the team was able to have meaningful, substantive conversations about Energy Smart, with both past and future participants.

The majority of the team's outreach was focused on increasing enrollment in the Home Performance with ENERGY STAR and Low-Income Weatherization offerings. The Energy Smart team also began signing up families enrolled in The Total Power Pilot run by Total Community Action in partnership with Entergy. Each family will receive one-on-one counseling from an Energy Smart team member to reduce their bills and help families become energy self-reliant.

Highlights

Table 5.3: Events by City Council District

Council District	Number of Events	% by District
A	2	4.9%
B	27	65.9%
C	3	7.3%
D	5	12.2%
E	3	7.3%
Total	41	100%

Commercial Marketing and Outreach Highlights

During Q4, the Energy Smart team continued to focus on building program awareness and driving participation within the business community throughout Orleans Parish as well as closing out projects. To further drive participation, the Energy Smart team released an incentive bonus for all new custom projects received, with the stipulation that they must finish installation in PY9 to be eligible for the increased incentive. The goal of this bonus was to drive as much production as possible by making custom incentives more appealing to customers and trade allies and creating a sense of urgency to complete those projects in PY9. In late December, the Program announced that PY9 would be extended three months and that the custom incentive bonus would remain in place through the extension period.

Paid advertising initiatives continued in Q4. A full color print ad ran in the October issue of Biz New Orleans magazine, their largest real estate and construction issue of the year. The Program received added value in the form of complimentary tickets to and additional distribution at the 9th Annual Real Estate & Economic Forecast Symposium held October 16, as well as additional distribution of the magazine at the Tulane Business Forum on October 4. Program overviews were developed and implemented via email campaigns targeting small and large customers, higher education, trade allies, non-profit organizations and associations. Energy Smart was invited to sit on a panel regarding green building at the 2019 Women in Construction: The Power of Connectivity Conference held October 17. The Energy Smart team presented a program overview at the Urban League of Louisiana's annual Opportunities Outlook 2020 for DBE Contractors seminar, held December 6.

The Energy Smart team updated existing assets on the Energy Smart website, such as messaging that reminded customers that October is energy efficiency month. To support the launch of the new Small Business Direct Install (SBDI) offering, the Energy Smart team developed co-branded the SBDI overview with service provider logos and service provider badges. The Energy Smart team also began updating the prescriptive overview collateral to include new linear LED and HD replacement lighting measures that will be offered as prescriptive measures beginning in January 2020.

During Q4 the Energy Smart team and Sodexo partnered to co-author a University of New Orleans (UNO) case study. UNO participated in the Energy Smart program and implemented significant lighting and HVAC measures across the campus resulting in over 2.8 million kWh in savings. Total incentives UNO received from the Energy Smart program totaled \$218,484.02. The case study is pending final review and will be released in early 2020.

The Energy Smart team will continue targeting marketing efforts to large and small C&I customer segments, trade allies, universities, commercial property managers and facility directors throughout the extension period. Tactics will include targeted e-blasts, paid google search campaign and continued direct customer outreach. The team plans to develop new case studies for the major customer segments and facility types to highlight successes, such as for restaurant and commercial property managers.

Marketing Collateral

- Color print ad for business publications
- Revising prescriptive overview with new lighting measures
- Finalizing University of New Orleans case study
- Co-branded SBDI Offering overview
- SBDI Service Provider Badges

Marketing Tactics

- Full color ¼ page ad ran in October issue of Biz New Orleans
- Eblasts targeting commercial and industrial customers and trade allies
- End of Year Bonus updates submitted to associations and organizations for inclusion in their newsletters
 - StayLocal
 - LifeCity
 - New Orleans Agenda
 - IFMA
 - GNOHLA
- Trade Ally newsletters

Table 5.4: C&I Eblast and Newsletters

	NAME	DATE SENT	OPEN RATE	CTR
	Eblast to Trade Allies Announcing Building Controls Trade Show and Opportunity to Table	10/1	49%	5%
	Q4 Trade Ally Newsletter	10/18	46%	4%
	Eblast to Trade Allies Regarding Q4 Trade Ally Group Advisory Meeting Reminder	11/4	51%	6%
	Eblast to Commercial and Industrial Customer Email List – Invitation to Building Automation Controls Trade Show	11/6	32%	2%
	Eblast to Trade Allies Messaging End of Year Incentive Bonus	11/19	48%	2%
	Eblast to Commercial and Industrial Customers Messaging End of Year Incentive Bonus	11/19	32%	2%
	Eblast to Trade Allies – Save the Date Invitation for 2020 Trade Ally Kick-Off Meeting	12/2	57%	N/A
	Eblast to Trade Allies Messaging PY9 Program Updates and Extension	12/24	49%	2%
	Eblast to Commercial and Industrial Customers Messaging PY9 Program Updates and Extension	12/24	33%	.5%

Outreach Tactics, Events and Presentations

During Q4, the Energy Smart team focused on closing out projects in all sectors as well as continuing to fill the project pipeline to meet savings goals. Direct outreach efforts to potential customers resulted in 23 potential leads. The Energy Smart team attended 27 meetings and made 22 presentations to customers and customer groups. Program overviews were presented to the following targeted customer segments: higher education, hospitality, healthcare, trade associations, non-profit organizations and commercial real estate.

Table 5.5: Q14 2019 Commercial Outreach Events

DATE	EVENT
Oct. 3	Capital One Meeting
Oct. 8	Waffle House Meeting
Oct. 10	IFMA Luncheon
Oct. 17	2019 Women in Construction Convening: The Power of Connectivity Conference
Oct. 21	Peter and Paul Bed and Breakfast Meeting
Oct. 21	HomeLife Gardens Meeting

Oct. 22	Louisiana Endowment for the Humanities Meeting
Oct. 24	Holy Cross College Meeting
Oct. 28	VIET Meeting
Oct. 28	Newman High School Meeting
Nov. 5	ULI/NOLABA Real Estate Breakfast
Nov. 11	Cyndi Nguyen office at City Hall Meeting
Nov. 12	Ashe Cultural Center Meeting
Nov. 19	City Park Meeting
Nov. 19	ASHRAE New Orleans Chapter
Nov. 21	Longue Vue Gardens Meeting
Dec. 2	GNO Inc. Meeting
Dec. 2	Mt. Carmel Meeting
Dec. 3	Troubadour Hotel Meeting
Dec. 4	Chamber of Commerce Annual Luncheon
Dec. 5	VIET Meeting
Dec. 9	Louisiana Endowment for Humanities Meeting
Dec. 15	Total Community Action/Total Power Seminar
Dec. 16	Total Power Press Event
Dec. 16	Peche Restaurant Meeting
Dec. 19	STRIVE
Dec. 19	Old 77 Hotel

Program Presentations:

- Higher education: 3
- Restaurant: 2
- Financial: 1
- Associations: 4
- Hotel: 3
- Healthcare: 1
- Non-Profit: 7
- Government: 1

Higher Education Cohort

The goal of the Higher Education Cohort is to develop a peer-to-peer exchange network that provides a forum for sharing effective methods for achieving energy savings as well as overcoming barriers to success. The Cohort provides a platform for collaboration to share knowledge, reduce barriers and promote effective strategies for making campuses more sustainable and energy efficient. The Cohort has evolved substantially since its launch in 2017 with more participating institutions and other organizations that face similar challenges from a campus configuration.

The Q4 meeting that was scheduled for December 10, was canceled due to scheduling conflicts with cohort members. The next higher education cohort is scheduled for February 11, 2020.

Table 5.6

DATE	LOCATION	TOPIC
Q4 – Dec. 10	Contemporary Arts Center	CANCELLED
Q3 – Sept. 17	The Shop	Member Presentations; Energy Smart Program Updates; Green Revolving Fund Overview; Higher Education Cohort Updates; Roundtable discussion
Q2 – May 14	LSU Health Services	Member Presentations; Energy Smart Program Updates; Higher Education Cohort Updates; Roundtable discussion.
Q1 – February 12	Archdiocese of New Orleans	2018 Program Results; Best Practices for Senior Management Engagement in Energy Efficiency; Roundtable discussion; goals for 2019.

Participating Institutions and Organizations:

- Dillard University
- Louisiana State University Medical Center
- Louisiana State University Health Foundation
- Southern University at New Orleans (SUNO)
- Tulane University
- University of New Orleans (UNO)
- Xavier University
- New Orleans Baptist Theological Seminary (NOBTS)
- Archdiocese of New Orleans
- New Orleans Baptist Association
- NOLA Public Schools
- Collegiate Academics

Trade Allies

Trade Ally Highlights

The Energy Smart team continued to build upon the success from the third quarter of PY9 with respect to trade ally development and training. The number of trade allies registered in the Commercial and Industrial Trade Ally Network grew in Q4 with the addition of ten new trade allies, bringing the total number to 122 at the close of 2019. In Q4 a total of ten trade allies submitted at least one project to the program. The team will continue to engage registered trade allies to spur activity and participation.

In November, the Energy Smart team hosted the Program's first Building Automation and Controls trade show at the LEED-Gold certified New Orleans BioInnovation Center, an event which brought together trade allies and potential customers seeking to control their property's energy usage through total-building control software. Thirteen trade allies were represented at the trade show, and customers from a wide variety of industries attended to learn about high-performance technology and meet industry providers.

In Q4, the Energy Smart team also accepted project submissions for the Small Business Direct Install program. Energy Smart team trained three trade allies to become providers in the SBDI program, bringing the total number of SBDI service providers to five by the end of Q4.

The Residential Trade Ally Network received two new applications in Q4 and these trade allies will begin performing services in early 2020.

The Energy Smart team focused on in-person meetings with trade allies to facilitate one-on-one trainings specific to rebate submissions and operational best practices, as well as to review and answer trade ally concerns or feedback. The team also engaged with trade ally crews to target residential multifamily and income-qualified customers. The team performed assessments in tandem with trade ally crews to ensure the swift completion of projects.

Of the ten trade allies who registered with the program in Q4, two of those hold diverse supplier certifications. Those two trade allies hold a total of eight diverse-supplier certifications between them.

Trade Ally Advisory Group (TAAG)

The Q4 Commercial and Industrial TAAG meeting was held on November 13, 2019, with 20 trade allies in attendance. Trade allies received updates on the status of incentive budgets and savings goals, an overview of the new Small Business Direct Install offering, announcements of upcoming training opportunities and an introduction to three local workforce-development specialists. Trade ally feedback during the meeting mostly centered upon the new SBDI offering and the reassurance of available program funding. The Energy Smart team discussed the SBDI incentives and guidelines in depth. The Energy Smart team also encouraged trade allies to take advantage of the available funding remaining and reminded them of the variety of Energy Smart marketing materials that can assist their sales approaches.

The Q4 Residential TAAG meeting was held on November 4, 2019, with nine trade allies representing six companies in attendance. The Energy Smart team reviewed obstacles with rebates and invoice submissions, as well as opportunities for improvement identified from inspections held during the quarter. Trade ally discussion included assessment requirements, services performed by trade allies, and identification of opportunities for program growth, with different ways to improve trade ally and customer experience. One major area of interest that was identified in the meeting was program communication on the assessments assigned to the trade ally. Specifically, the trade allies requested information from

the Energy Smart Program clarifying the current condition of the home and the obstacles a technician may face at that home.

Other discussion topics included:

- Assessment software used by the Energy Smart team.
- Regular follow-up communications on paid rebates.
- New marketing for customers discussing the services that a Trade Ally will perform.

Measuring the Network

Contractor Engagement:

Table 6.1

CATEGORY	# OF COMPANIES
C&I Network	122
Residential Network	26
Total Engagement	148

Contractor Participation:

Table 6.2

CATEGORY	# OF COMPANIES
C&I Network	10
Residential Network	11
Total Participation	21

C&I Trade Ally Newsletter Statistics	
Date Sent	2/5/19
# Sent	92
Open Rate	58.7%
Click Rate	13%
Total Clicks	19
Total Opens	189
Unsubscribes	0
Time Spent Viewing Email	N/A

Table 6.3

Residential Trade Ally Communication Statistics				
Name of Email	TAAG Meeting and Training Reminder	Rebate Regression Notification	December Newsletter	PY10 Extension Notification
Dates Sent	10/27/19	11/21/19	12/6/19	12/26/19
# Sent	93	87	87	86
Open Rate	53.8%	52.9%	49.4%	47.7%
Click Rate	12.2%	17.4%	20.9%	N/A
Total Clicks	11	18	13	N/A
Total Opens	176	113	71	80
Unsubscribes	0	0	0	0
Time Spent Viewing Email	75.8% Read, 21.2% Skimmed, 3% Glanced	72.4% Read, 27.6% Skimmed	66.7% Read, 25.9% Skimmed, 7.4% Glanced	57.1% Read, 42.9% Skimmed

Program Training

Residential

On October 29, 2019, the Energy Smart team held a residential trade ally training entitled “Proper Materials and Practices for Duct & Air sealing” that focused on the technical aspects of properly air sealing and duct sealing a home for technicians and crew leads. This training discussed the ways to perform services correctly to ensure that work performed is long-lasting and safe for the home. The trade allies in attendance learned about the strengths and weaknesses of the different methods of sealing systems and practiced identifying issues with services performed on different home types. The team received requests from trade allies that were unable to attend, requesting that the training sessions be summarized for their technicians.

Throughout Q4, field trainings were regularly held for technicians while working in customer homes. The two main areas of focus were customer communication and common home hazards. The Energy Smart team also offered direct meetings with trade allies to train staff on program processes.

The Energy Smart team also provided “Train the Trainer” style training on the Energy Smart Program and Retail offering, including available rebates for sales with retail managers, cashiers, other applicable employees and interested customers who were present. These trainings were also an opportunity to provide marketing materials and signage to employees.

Commercial and Industrial

The Energy Smart team focused on training trade allies in program implementation as well as the new combined calculator tool in Q4. The Energy Smart team trained 26 trade allies in Q4. Three of those trade allies were trained to become Small Business Direct Install service providers, bringing the total of SBDI providers to five. The ten trade allies who registered in Q4 were trained on overall program implementation with onboarding that included a calculator overview, proposal suggestions from facility directors and access to marketing materials. The number of trade allies trained as well as the type of training administered is shown in the graph and chart below.

Chart 20.1

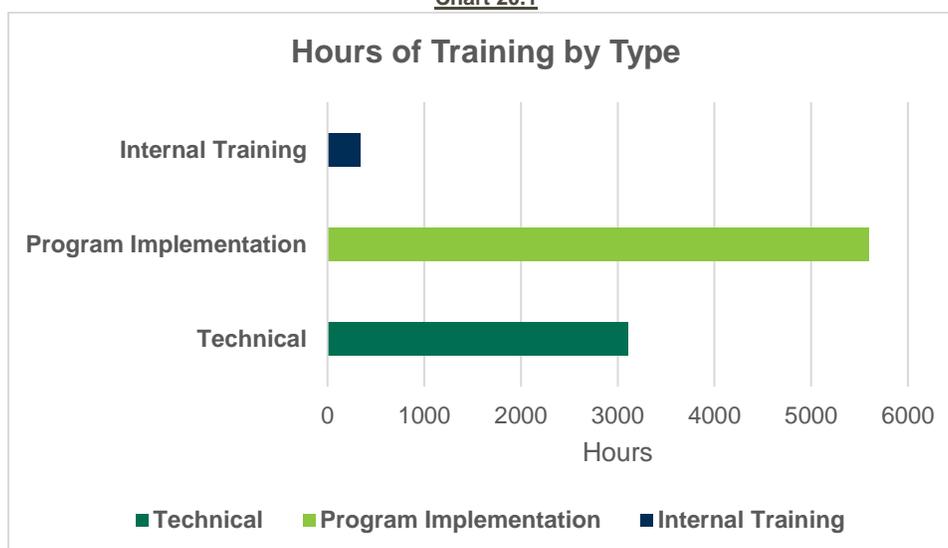
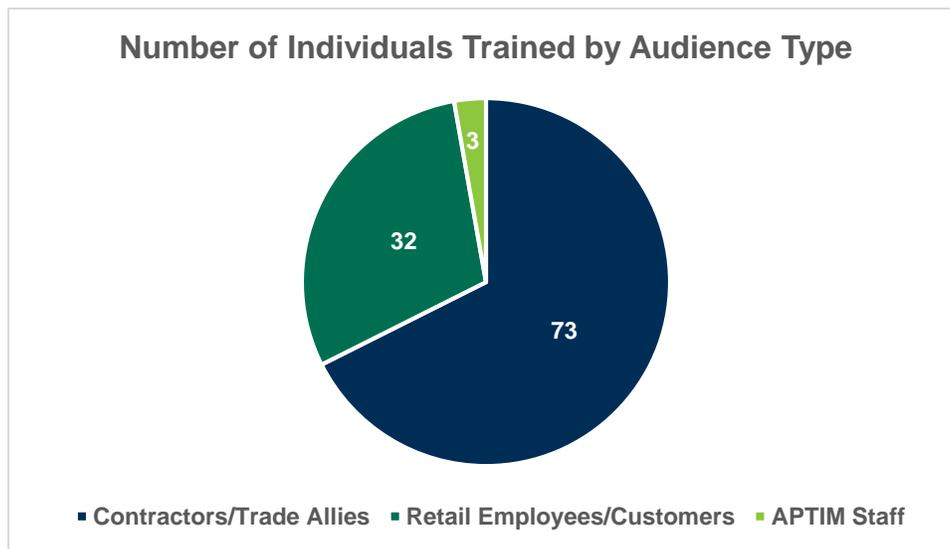


Chart 20.2



Initiatives

Supplier Diversity

Energy Smart partners with multiple small and disadvantaged businesses to help deliver program services. Choosing these partners was part of a conscious decision to create a deliberately dynamic and diverse delivery model and invest in the development of local businesses, providing them with necessary experience to thrive and grow in the energy efficiency sector.

These small, minority and/or disadvantaged businesses that support Energy Smart are meaningful contributors to the program design and delivery. Their scopes of work were developed to increase their skills and capabilities in the energy efficiency field and/or expand capacity and exposure in the New Orleans market.

In total, Energy Smart spent nearly \$150,000 of non-incentive program funds on diverse suppliers in the fourth quarter of PY9.

Workforce Development

The Energy Smart team placed a strong emphasis in Q4 on ramping up workforce development activities in energy efficiency. In October the Energy Smart team facilitated a meeting between trade allies and one of New Orleans' central workforce-development agencies, the New Orleans Business Alliance. This meeting afforded trade allies the opportunity to connect with an agency which is currently facilitating job creation in high-demand fields. Representatives from nine trade allies attended the meeting, providing the New Orleans Business Alliance an opportunity to learn how it could train young adults to enter the energy-efficiency workforce.

Those workforce-development specialists were:

- Ryan Mattingly, Program Manager with YouthWorks, City of New Orleans

- Shawn Montgomery, Program Manager with YouthWorks, City of New Orleans
- Sarah Bell, Director of Employer Partnerships with YouthForce NOLA

Each of these workforce-development specialists presented on their organizations and the opportunities to connect trade allies to qualified employees. The facilitation of these introductions is a direct way that Energy Smart is achieving its goal of growing a robust energy-efficiency economy and workforce in New Orleans. Multiple job interviews between trade allies and job seekers have already taken place through these introductions, as well as at least one job hire in Q4.

Residential workforce development initiatives included regular field-based trainings with trade ally staff to explain different building code requirements, best practices and the effective ways to communicate about the Program with customers. These trainings occur regularly while the Energy Smart team conducts quality assurance inspections of trade ally work. Additional meetings were held at the request of trade allies, where aspects of the offerings or measures were explained in greater detail, to ensure best possible operations between a trade ally and the Program.



FINANCIAL PERFORMANCE



Incentive Budget Highlights

	INCENTIVES SPENT	INCENTIVE BUDGET*	% OF BUDGET*
ALGIERS – SMALL C&I	\$32,219	\$105,675	30.49%
ALGIERS - LARGE C&I**	\$113,930	\$132,962	85.69%
ALGIERS – PFI**	\$28,815	\$51,865	55.56%
ALGIERS – RES**	\$217,197	\$277,161	78.36%
N.O. – SMALL C&I	\$736,961	\$1,136,305	64.86%
N.O. - LARGE C&I	\$1,691,729	\$3,445,727	49.10%
N.O. – PFI	\$54,062	\$446,882	12.10%
N.O. - RES	\$2,009,583	\$2,432,091	82.63%
TOTAL	\$4,884,497	\$8,028,668	60.84%

*Goals are reflective of the Supplemental and Amended Energy Smart Implementation Plan PY 7 – 9, approved 12/14/2017.

**Algiers budget reflective of increases authorized per Letter from Council Chair Helena Moreno to Brian L. Guillot dated October 4, 2019 and referenced in Resolution R-19-516.

As of December 31, 2019, ENO-Legacy Energy Smart had a remaining balance of approximately \$294,000 left in the account. This funding is composed of Rough Production Cost Equalization payments as well as funding stemming from a Community Block Development Grant tax treatment. ENO-Algiers Energy Smart had approximately \$0 remaining in the account. The account balance as of December 31, 2019 does not reflect all of the costs that will be incurred to close out Program Year 9.

Appendices

Appendix A: School Kits & Education Summary

SCHOOL	DATE	NUMBER OF KITS	ENROLLMENT OFFERING
St. Rita Catholic School	10/3/19	27	Scholarship
Joseph A. Craig Charter School	10/4/19	33	Charter
L.B. Landry-O.P. Walker College and Career Preparatory High School	10/7/19	150	Charter
Einstein Charter Middle	10/14/19	150	Charter
Andrew H. Wilson Charter School	10/17/19	160	Charter
Audubon Charter School	11/1/19	35	Charter
KIPP Central City Academy	11/4/19	130	Charter
ReNEW Schaumburg Elementary	11/7/19	90	Charter
Abramson Sci Academy	11/7/19	120	Charter
New Orleans Charter Science & Math High School	12/2/19	40	Charter
ReNEW SciTech Academy	12/9/19	150	Charter
Bauhaus Montessori	12/12/19	10	Private
Total		1,095	

Appendix B: Community Outreach Summary

DATE	PRESENTATION TYPE	EVENT NAME/ ORGANIZATION	DISTRICT	AUDIENCE	REACH
10/11/2019	Fair or Festival	Wings and Watts	B	Residential	220
10/9/2019	Presentation	ReRefresh Project monthly meeting	B	Residential	26
10/10/2019	Presentation	RAI Ministries - Senior Center	E	Residential	22
10/14/2019	Table at Public Building	CCC-Eastbank	B	Residential	100
10/17/2019	Table at Public Building	CCC-Eastbank	B	Residential	65
10/19/2019	Fair or Festival	STEM Fest	B	Residential	5000
10/21/2019	Table at Public Building	CCC-Eastbank	B	Residential	80
10/24/2019	Table at Public Building	CCC-Eastbank	B	Residential	90
10/24/2019	Presentation	Aurora West Neighborhood Presentation	C	Residential	8
10/26/2019	Table at Public Building	Dillard 13th Annual Housing, Health and Resource Fair	C	Residential	280
10/28/2019	Table at Public Building	CCC-Eastbank	B	Residential	65
10/29/2019	Presentation	Rock N' Network	A	Residential	250
10/30/2019	Training	LA Green Corps Class	D	Residential	6
10/30/2019	Table at Public Building	Central Circle Wellness Luncheon	B	Residential	65
10/31/2019	Table at Public Building	CCC-Eastbank	B	Residential	80
11/1/2019	Training	LA Green Corps	D	Residential	8
11/4/2019	Table at Public Building	CCC - Eastbank	B	Residential	150
11/6/2019	Table at Public Building	Tulane Internship Fair	A	Residential	120
11/7/2019	Table at Public Building	CCC-Eastbank	B	Residential	80
11/9/2019	Fair or Festival	NO Neighborhood Summit	B	Residential	250
11/11/2019	Table at Public Building	CCC-Eastbank	B	Residential	65
11/13/2019	Presentation	ReRefresh Project Meeting	B	Residential	20
11/13/2019	Presentation	Irish Channel Neighborhood Association Meeting	B	Residential	36
11/14/2019	Table at Public Building	CCC-Eastbank	B	Residential	80
11/14/2019	Presentation	RAI Ministries	E	Residential	17
11/16/2019	Fair or Festival	Urban League School Expo	B	Residential	300
11/19/2019	Meeting	TCA / National Energy & Utility Affordability Coalition (NEUAC) / Entergy Meeting	B	Residential	16
11/20/2019	Meeting	Central Circle Networking Luncheon	B	Residential	24
11/23/2019	Fair or Festival	Cleanup NOLA	B	Residential	50
11/23/2019	Fair or Festival	Water Fall Fest	B	Residential	400
12/2/2019	Table at Public Building	CCC-Eastbank	B	Residential	70
12/3/2019	Table at Public Building	CCC-Eastbank	B	Residential	165
12/11/2019	Presentation	ReRefresh Project Meeting	B	Residential	28
12/12/2019	Training	LA Green Corps	D	Residential	9
12/12/2019	Presentation	TCA Workshop	B	Residential	50
12/13/2019	Training	LA Green Corps	D	Residential	9
12/14/2019	Fair or Festival	STEM Saturday	E	Residential	1000
12/16/2019	Table at Public Building	TCA Super LiHeap Day	B	Residential	100
12/17/2019	Table at Public Building	Entergy Renewable Portfolio Meeting	C	Residential	50
12/18/2019	Table at Public Building	Entergy renewable Portfolio Meeting	C	Residential	35
				Total Reach	9,489

Appendix C: Training and Education

DATE	TITLE	AUDIENCE	ATTENDEES	LENGTH	OBJECTIVE	DESCRIPTION
10/02/2019	Retail Training	Retail Employees Dollar Tree Chef Menteur Hwy	1	15	Train retail facility on program implementation	Program purpose, savings/incentives, product knowledge
10/02/2019	Retail Training	Retail Employees at Home Depot on Claiborne	4	15	Train the trainer style walk through of Energy Smart and ES retail program offerings including available rebates for sales with retail managers, cashiers, other applicable employees and interested customers who are present.	Program purpose, savings/incentives, product knowledge
10/03/2019	Trade Ally Training	Capital One Operations Department	1	15	Train operations manager on program implementation	Calculator training, program implementation required documents, communications
10/07/2019	Trade Ally Training	Potential Trade Ally Bayou Lighting	1	45	Train potential trade ally on program overall	Calculator training, program implementation required documents, communications
10/09/2019	Trade Ally Training	Diversified Energy	1	45	Provide onboarding to a new trade ally	Calculator training, program implementation required documents, communications
10/10/2019	Trade Ally Training	N.A.C. Smart Technologies	6	30	Provide Small Business Direct Install Training	Program overview, communications, incentive values, timeframe, and project submission paperwork
10/11/2019	Trade Ally Training	Echo Food Service	1	30	Provide a program overview to a potential trade ally	Program overview, calculator training, and required project submission paperwork
10/11/2019	Trade Ally Training	Coburn Supply Company	11	30	Provide Small Business Direct Install Training	Program overview, communications, incentive values, timeframe, and project submission paperwork
10/12/2019	Residential Field Training	Trade allies/contractors	1	15	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Schedule compliance training
10/16/2019	Trade Ally Training	LED Supply Plus	1	30	Provide Small Business Direct Install Training	Program overview, communications, incentive values, timeframe, and project submission paperwork
10/16/2019	Trade Ally Training	Flick Engineering	2	15	Provide an overview of Retro-commissioning incentives	RCx incentive overview including opportunity assessment, study and incentives, and measurement and verification
10/16/2019	Trade Ally Training	Hemma Lighting	1	15	Onboarding for a new trade ally	Program overview and required project submission paperwork

10/17/2019	Retail Training	Retail employees at Dollar Tree on General DeGaulle	2	15	Train retail facility on program implementation	Program purpose, savings/incentives, product knowledge
10/17/2019	Retail Training	Retail employees at Wal-Mart on Behrman	3	30	Train the trainer style walk through of Energy Smart and ES retail program offerings including available rebates for sales with retail managers, cashiers, other applicable employees and interested customers who are present.	Program purpose, savings/incentives, product knowledge
10/17/2019	Retail Training	Retail employees at Home Depot I-10 Service Road	1	15	Train retail facility on program implementation	Program purpose, savings/incentives, product knowledge
10/17/2019	Retail Training	Retail employees at Dollar General on MacArthur Blvd	1	15	Train retail facility on program implementation	Program purpose, savings/incentives, product knowledge
10/17/2019	Trade Ally Training	C&I Trade Ally ABM	1	45	Provide onboarding to a new trade ally	Program implementation overview, marketing materials, communications, and calculator training
10/17/2019	Trade Ally Training	C&I Trade Ally White Rhino Construction	4	45	Provide Small Business Direct Install Training	Program overview, communications, incentive values, timeframe, and project submission paperwork
10/21/2019	Retail Training	Retail employees at Green Project on Marais St	1	15	Train retail facility on program implementation	Program purpose, savings/incentives, product knowledge
10/21/2019	Trade Ally Training	Coburn Supply Company	1	15	Review of SBDI program principles	Provide a review of the timeframe and incentives in the SBDI program
10/23/2019	Residential Field Training	Residential Trade Allies	2	30	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Best practices for duct sealing, importance of foaming around the boots, application of mastic to the inner line, and caution against sealing the outer liner to the collar
10/23/2019	Trade Ally Training	Johnson Controls	1	15	Provide a program overview	Provided information on incentives for chiller replacements and calculating savings, as well as new control systems.
10/29/2019	Trade Ally Training	Residential Trade Allies	11	120	Technical Training in weatherization	Training on Air Sealing and Duct Sealing, including the best methods and safest ways to work with weatherizing homes
10/30/2019	Trade Ally Training	White Rhino Construction	4	30	Provide Small Business Direct Install Training	Program overview, communications, incentives, values, timeframe, and project submission paperwork
10/31/2019	Trade Ally Training	Irion Lighting	1	60	Provide program overview to a potential trade ally	Program overview, communications, calculator training, and required paperwork for project submission
11/05/2019	Retail Training	Walgreens on General De Gaulle	3	15	Train the trainer style walk through of Energy Smart and ES retail program offerings including available rebates for sales with retail managers, cashiers, other applicable employees and interested customers who are present.	Program purpose, savings/incentives, product knowledge

11/05/2019	Residential Trade Allies	Residential Trade Ally Advisory Group Meeting	9	120	Offer an opportunity for TA feedback, and discuss planning for 2020	CRM discussions, badges, feedback on quarterly newsletter, and trainings offered by Franklin
11/07/2019	Trade Ally Training	Quality Compressed Air	1	30	Provide onboarding to a new trade ally	Program overview, communications, calculator training, and required paperwork for project submission
11/07/2019	Trade Ally Training	Graybar	1	15	Provide calculator training	Provide calculator training and review required paperwork for project submission
11/11/2019	Trade Ally Training	NOLA LED	3	30	Provide Small Business Direct Install Training	Program overview, communications, incentives, values, timeframe, and project submission paperwork
11/13/2019	Trade Ally Training	Trade Ally Advisory Group meeting	20	120	Facilitate the quarterly report for C&I Trade Allies	Provide program updates, facilitate introductions with workforce-development agencies, provide training on SBDI measures, and receive feedback on program implementation
11/18/2019	Residential Field Training	Trade Allies	1	15	Train residential homeowner on energy efficiency	Trained homeowner on how to use her Thermostat, and basic building science knowledge with regard to insulation in her attic and sealed ducts
11/19/2019	Residential Field Training	Trade Allies	2	30	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Training on worksite organization & cleanliness
11/25/2019	Trade Ally Training	Charlie Boyle, Engineer	1	60	Provide onboarding to a new trade ally	Program overview, communications, incentive values, and project submission paperwork
12/03/2019	Trade Ally Training	GH Mechanical	1	60	Provide onboarding to a new trade ally	Program overview, communications, incentive values, and project submission paperwork
12/03/2019	Residential Field Training	Residential Trade Allies	2	15	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Training on after-work cleanup & site maintenance.
12/03/2019	Residential Field Training	Residential Trade Allies	2	15	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Training on working with difficult customers, as well as test-in procedures (covering all vents securely)
12/04/2019	Residential Field Training	Residential Trade Allies	3	30	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Training on material usage, work prioritization.

12/04/2019	Residential Field Training	Residential Trade Allies	3	30	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Training on direct install standards/opportunities & Site safety.
12/04/2019	Residential Field Training	Residential Trade Allies	3	30	Training technicians and crew leads. Explaining the Energy Smart Best Practices Standards.	Training on program requirements, paperwork/rebate information, and diagnostic testing procedures.
12/05/2019	Trade Ally Training	Royal Ranges Commercial Fryers	1	15	Provide an overview of commercial-kitchen equipment incentives	Program overview, commercial-kitchen incentives, and required paperwork for project submission
12/09/2019	Residential Field Training	Residential Trade Allies	1	30	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Training on rebate pricing. Best practices. licensing/insurance requirements.
12/10/2019	Residential Field Training	Residential Trade Allies	4	30	Training technicians and crew leads the best methods to performing services for customers. Explaining the Energy Smart Best Practices Standards.	Hazard Disclosure, work-site safety, testing order of operations
12/12/2019	Trade Ally Training	Balthazaar Electric	3	60	Provide onboarding for a new trade ally	Program overview, communications, calculator training, and required documentation for project submission
12/12/2019	Trade Ally Training	NOLA Restaurant and Design	2	45	Provide onboarding for a new trade ally	Program overview with a focus on commercial kitchen equipment, communications, calculator training, and required documentation for project submission
12/18/2019	Trade Ally Training	Eskew Dumez Ripple	2	60	Program Overview for a potential new trade ally	Program overview with a focus on energy modeling, communications, calculator training, and required documentation for project submission
12/20/2019	Trade Ally Training	American Electric LED	1	30	Provide onboarding for a new trade ally	Program overview, communications, calculator training, and required documentation for project submission
TOTAL NUMBER TRAINED			106			

Appendix D: Marketing Collateral

C&I Collateral



BUILDING A BETTER NEW ORLEANS

Get up to **\$100,000** per site, per year to incorporate energy efficiency upgrades into the design and construction of new or existing buildings through the Energy Smart program.

Energy Smart incentivizes business customers to perform energy saving upgrades, such as:

CHILLERS & MOTORS	HVAC UPGRADES & OPTIMIZATION
BUILDING AUTOMATION SYSTEMS	LIGHTING & LIGHTING CONTROLS

Visit energysmartnola.com or call **504-229-6868**.

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Biz New Orleans October ¼ page print ad



Building Automation and Controls Trade Show Invitation to Table



Energy Smart is providing commercial and industrial trade allies that offer building automation and building controls the opportunity to table at a trade show event on Wednesday, Nov. 20 at the New Orleans BioInnovation Center located at 1441 Canal St.

Facility directors and commercial property owners from various industries will be invited to attend. This is an opportunity to showcase your building controls products and services to a key audience.

The goal of this trade show is two-fold:

- Provide a platform for facility directors and commercial property owners to gain exposure to the most current building-automation and control technology.
- Connect those facility directors and property owners with trade allies that can provide those services.

You will table for 90 minutes from 9 - 10:30 a.m. Table setup will begin at 8 a.m.

You are eligible to table at this event if you offer building controls as a core part of your business. If you are interested in tabling but unsure if your products and services are suitable for this event, please contact Kevin Fitzwilliam with Energy Smart at kevin.fitzwilliam@edn.com.

Trade allies that are interested in tabling at this event need to fill out the questionnaire located [here](#) or by clicking on the button below. Deadline to submit the questionnaire is 5 p.m. on Friday, Oct. 11.

Questionnaire

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Our mailing address is:
Energy Smart
900 Camp Street, Suite 384
New Orleans, LA 70130

Want to change how you receive these emails?
You can update your preferences or unsubscribe from this list.

Building Controls Trade Show Invitation to Table Announcement – sent 10/1



The Commercial and Industrial Trade Ally Quarterly Newsletter is a resource for trade ally partners to learn about updates to the program and information about upcoming trade ally events, training and professional development opportunities.

YTD Review and Highlights

The Energy Smart Team would like to thank all the trade allies who have participated in the program in 2019. We welcome the future participation of new and existing trade allies.

- As of the second week of Oct. 2019, Energy Smart has received 180 projects from a total of 126 different customers.
- Out of the total number received, 72 projects have been completed.
- Energy Smart has reached 92% of its goal for kWh savings for commercial and industrial projects.
- Energy Smart has reserved 68% of available budget for commercial and industrial projects.
- Energy Smart has paid over \$1.4 million in incentives to business customers, and an additional \$2.1 million is reserved for 2019. Of the 2019 budget of \$5.2 million, \$1.7 million in funding is still available.

Current applications and program tools can be found on the Energy Smart [website](#).

Recent Trainings

Retro-commissioning Breakfast and Learn

On Aug. 13, Energy Smart facilitated a discussion on Retro-commissioning incentives. The event was well-attended with an even mix of RCx service providers and facility directors or property owners. The discussion focused on the RCx incentive process. Attendees were able to ask questions and make connections that will drive the submission of future RCx projects.

For more information on the RCx incentives, click [here](#).

Combined Incentive Calculator Training

On Aug. 8, Energy Smart unveiled its new combined commercial and industrial incentive calculator tool designed to streamline the way projects are submitted to Energy Smart. The main advantage of this calculator is that the application and measures are consolidated in one place.

Prior to this new combined calculator, the application was separate from the calculators, and there were three separate calculators. Now, all are combined into one calculator and projects in the lighting or non-lighting calculator start their process in the same place.

Please download a new calculator from the website for each new project. The most recent version is required as a part of your project application, which ensures incentives are calculated using an updated calculator.

Workforce Development with the New Orleans Business Alliance

On Oct. 3, Energy Smart facilitated a discussion on workforce development in energy efficiency with Monique Robinson of the NOLABA. NOLABA provides funding to organizations that work with opportunity youth entering the workforce in New Orleans. These organizations are the Youth Empowerment Project, the Urban League and Operation Spark.

NOLABA primarily works with funding from the Workforce Innovation and Opportunity Act, which provides federal dollars that cover the cost of internships for opportunity youth. NOLABA also partners with Job One to work with eligible applicants for WIOA funding.

Job One is looking for new companies that could provide internships so opportunity youth can take advantage of WIOA funding. The intern is paid directly through WIOA wages. Monique stated that the path for a company to offer internships is simple and that she can facilitate the path.

Details for companies interested in offering internships through NOLABA and Job One:

- Job One internships range from 20 to 40 hours a week, general training is provided before the student starts an internship, and companies will interview applicants and negotiate the length of the internship.

Input from trade allies for potential interns:

- Opportunities are available for a variety of positions, including graphic design, general office positions, data analysts to track time spent in the field and assist with budget reduction strategies, technicians to conduct site surveys and back-office positions that would allow young employees to learn engineering skills.

Events and Professional Development

Energy Smart Q4 2019 Trade Ally Advisory Group Meeting

Nov. 13
8 - 11 a.m.

Urban League
4840 S. Carrollton Ave., Ste. 110
New Orleans, LA 70119

Agenda:

- Feedback on the trade ally searchable online database and the new combined calculator.
- Review the status of the program's 2019 goals and incentive budgets.
- Discussion of the upcoming "trade show" in building automation on Nov. 20.
- Energy efficiency building tour – date TBD.
- Q&A.

REGISTER

BIM Building Analyst Training

Oct. 21 - 23
8:30 a.m. - 3 p.m.

Louisiana Housing Corp. Training Center
11837 Industrialplex Blvd.
Baton Rouge, LA 70809

Event Details: This BIM training will provide individuals with the knowledge, skills, and certification preparation needed to work in the home energy performance industry. This five-day BIM Building Analyst course is a certification prep training course. Official BIM certification requires a passing grade on BIM written and field examinations.

REGISTER

DOE Webinar

"Energy Efficiency and Renewable Energy in Small and Rural K-12 Schools"

Oct. 22
2 - 3 p.m.

Event Details: This webinar will cover energy efficiency and renewable energy resources and strategies available to small and rural schools to help them train a robust workforce and achieve energy and cost savings. It will also showcase stories of states and K-12 school districts that are successfully navigating their challenges and proving that energy efficiency provides a worthwhile return on investment.

REGISTER

Urban League "Veterans Small Business Breakfast and Resource Summit"

Nov. 5
9 a.m. - noon

Urban League
4840 S. Carrollton Ave., Ste. 110
New Orleans, LA 70119

Event Details: The Urban League of Louisiana is pleased to host its third annual Veterans Small Business Breakfast and Resource Summit in celebration of veterans' entrepreneurship and as an extension of National Veterans Small Business Week. During this event, we will shine a light on veterans' entrepreneurship in Louisiana and provide opportunities for resource-sharing, storytelling and connections. Veteran entrepreneurs will hear about the many resources that are available to them and their spouses to start or grow their businesses. We will also hear from veteran entrepreneurs about their success in using various resources to support their business goals.

* Energy Smart is not affiliated with the production of this training.

REGISTER

ASHRAE New Orleans Chapter - November General Meeting

Nov. 19
8:30 - 7:30 p.m.

Mr. Ed's Oyster Bar and Fish House
3117 21st St.
Metairie, LA 70002

* Energy Smart is not affiliated with the production of this training.

REGISTER

Urban League "Outlook Opportunities 2020 for DBBs in Construction"

Dec. 5
9 a.m. - noon

Urban League
4840 S. Carrollton Ave., Ste. 110
New Orleans, LA 70119

Event Details: The Urban League of Louisiana is gearing up to host its annual event, "Opportunities Outlook 2020 for DBB Contractors." This annual event is held to encourage contractors to begin preparing for the upcoming year by focusing attention on new opportunities for strategic growth and competitiveness. One segment of this event will feature updates on current opportunities and upcoming bids from procurement officers and prime contractors.

Urban League would like to invite you to share available information on your organization's upcoming bid opportunities for 2020 and beyond. Each participating contractor will be invited a maximum of

Energy Smart Trade Show in Building Automation

Nov. 20
9 a.m. - 10:30 p.m.

New Orleans Convention Center
1441 Canal Street
New Orleans, LA 70112



Building Automation and Controls Trade Show



Interested in learning about new cutting-edge building automation and controls technology and meeting the service providers that offer these services? Then mark your calendar and plan on attending the first Energy Smart Building Automation and Controls trade show.

Wednesday, Nov. 20
9 - 10:30 a.m.
New Orleans BioInnovation Center
1441 Canal St.
New Orleans, LA

The goal of this trade show is two-fold:

- Provide a platform for you to gain exposure to the most current building-automation and control technology.
- Connect you to trade allies that can provide those services.

After the trade show, Jesse Ramsay, BioInnovation Center Facilities Manager, will give you a tour of the facility, which is the first laboratory building in Louisiana to achieve LEED Gold certification.

RSVP

C&I Customer Eblast on Building Automation and Controls Trade Show – November 6

End-of-Year Incentive Bonus



Dear Energy Smart Trade Allies and Commercial and Industrial Customers,

To help close the gap on the kWh savings goals for 2019, Energy Smart is offering an **Increased Incentive** on new commercial custom projects. **Custom projects installed by Dec. 31 will receive an additional \$0.03/kWh.**

- Small Commercial custom incentives increased from \$0.12/kWh to **\$0.15/kWh.**
- Large Commercial custom lighting incentives increased from \$0.10/kWh to **\$0.13/kWh.**
- Large Commercial custom non-lighting incentives increased from \$0.12/kWh to **\$0.15/kWh.**

This is a **limited-time-only** event, so don't miss out.

Custom Incentive Bonus

Additional details regarding the custom incentive bonus include:

- All standard requirements listed on the Energy Smart Commercial Application apply.
- Custom bonus calculator is available [here](#) on the Energy Smart website.
- Bonus eligible for **new projects received on or after November 18.**
- Project must be fully installed and operational with the **Project Completion Notice submitted by Dec. 31.**
- Bonus **available on a first-come, first-served** basis until Dec. 31 or until funds are exhausted.
- Application submission does not guarantee bonus.
- Bonus will be paid to the recipient of the incentive check.

POTENTIAL PROJECT EXAMPLES		
Small Commercial custom project:		
100,000 kWh saved x \$0.12 (standard incentive)	100,000 kWh x \$0.03 (bonus)	Total Incentive
\$12,000	\$3,000	\$15,000
.....		
Large Commercial custom lighting project:		
250,000 kWh saved x \$0.10 (standard incentive)	250,000 kWh x \$0.03 (bonus)	Total Incentive
\$25,000	\$7,500	\$32,500

We hope these changes will help New Orleans commercial customers take advantage of even greater energy savings.

For more information about Energy Smart, visit energysmartnola.com, email Info@energysmartnola.com or call 504-228-8888.

Thank you,
The Energy Smart Program

End of Year Incentive Bonus Eblast – November 19

Energy Smart Program Updates



Dear Energy Smart Residential Trade Allies,

We have an exciting program update to share with you.

- **The current program year has been extended another three months which means:**
 - All projects must be completed by the new deadline of March 31, 2020;
 - Current program year incentives will be in effect through March 31, 2020, so continue to submit and complete projects.

The reason for the program extension is that City Council and Entergy New Orleans are in the final stages of finalizing the plan for the next program cycle, which is tentatively scheduled to launch April 1, 2020. While the plan is being finalized, we do not want you to miss opportunities to help New Orleans residents become energy efficient.

Update on the 2020 Kick-Off Meeting

Since the current cycle year is being extended three months, we will postpone the Jan. 8 2020 Trade Ally Kick-Off meeting. The tentative new date for the Kick-Off meeting is April 1, 2020. Once details have been finalized we will send out a formal invite.

In the meantime, we have scheduled a residential TAAG meeting for Jan. 14. Purpose of this meeting is to share more program updates and answer any questions you may have regarding the three month extension and next program cycle.

Urban League of New Orleans
4840 S. Carrollton Ave., Ste. 110
New Orleans, LA 70119

1 - 3 p.m.
Jan. 14, 2020

For more information about Energy Smart, visit energysmartnola.com, email: info@energysmartnola.com or call 604-229-8383.

Thank you,
The Energy Smart Program

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Our mailing address is:
Energy Smart
200 Poydras Street, Suite 2000
New Orleans, LA 70112

Program Year 9 Updates – December 24

ENERGY SMART END-OF-YEAR INCENTIVE BONUS



CUSTOM INCENTIVE BONUS

To help close the gap on the kWh savings goals for 2019, Energy Smart is offering an **increased incentive** on new commercial custom projects. Custom projects installed by Dec. 31 will receive an additional \$0.03/kWh.

- Small Commercial custom incentives increased from \$0.12/kWh to **\$0.15/kWh**.
- Large Commercial custom lighting incentives increased from \$0.10/kWh to **\$0.13/kWh**.
- Large Commercial custom non-lighting incentives increased from \$0.12/kWh to **\$0.15/kWh**.

This is a **limited-time-only** event, so don't miss out.

INCENTIVE BONUS DETAILS

Additional details regarding the custom incentive bonus include:

- All standard requirements listed on the Energy Smart Commercial Application apply.
- Custom bonus calculator is available on the Energy Smart website.
- Bonus eligible for **new projects received on or after November 18**.
- Project must be fully installed and operational with the **Project Completion Notice submitted by Dec. 31**.
- Bonus **available on a first-come, first-served basis** until Dec. 31 or until funds are exhausted.
- Application submission does not guarantee bonus.
- Bonus will be paid to the recipient of the incentive check.

POTENTIAL PROJECT EXAMPLES

Small Commercial custom project:

100,000 kWh saved x \$0.12 (standard incentive)	+	100,000 kWh x \$0.03 (bonus)	=	Total Incentive
\$12,000		\$3,000		\$15,000

Large Commercial custom lighting project:

250,000 kWh saved x \$0.10 (standard incentive)	+	250,000 kWh x \$0.03 (bonus)	=	Total Incentive
\$25,000		\$7,500		\$32,500

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Custom Bonus Incentive One-Sheet Document

ENERGY SMART PRESCRIPTIVE INCENTIVE RATES

AS OF JAN. 1, 2020 (MAY CHANGE AT PROGRAM'S DISCRETION)



PRESCRIPTIVE INCENTIVES				
EXISTING EQUIPMENT	EFFICIENT EQUIPMENT	Small Commercial and Industrial	Large Commercial and Industrial	Unit
LIGHTING: EXIT SIGN REPLACEMENT				
Incandescent/CFL Exit Sign	LED Exit Sign ≤ 5 watts. Meets State Fire Marshal Codes/UL rated	\$20	\$20	per sign
LIGHTING: INCANDESCENT AND FLOURESCENT REPLACEMENTS				
Incandescent/CFL Screw-In Lamp/Bulb	LED Lamp/Bulb (1 to 6 watts)	\$3	\$3	per lamp
Incandescent/CFL Screw-In Lamp/Bulb	LED Lamp/Bulb (7 to 11 watts)	\$4	\$4	per lamp
Incandescent/CFL Screw-In Lamp/Bulb	LED Lamp/Bulb (12 to 17 watts)	\$5	\$5	per lamp
Incandescent/CFL Screw-In Lamp/Bulb	LED Lamp/Bulb (≥ 18 watts)	\$6	\$6	per lamp
T8/T12 2ft. Linear Fluorescent ¹	2' Linear LED	\$3	\$2	per lamp
T8/T12 4 ft. Linear Fluorescent ¹	4' Linear LED	\$6	\$5	per lamp
T8/T12 8 ft. Linear Fluorescent ¹	8' Linear LED	\$14	\$12	per lamp
T8/T12 (high output) 4 ft. Linear Fluorescent ¹	4' Linear LED	\$10	\$10	per lamp
T8/T12 (high output) 8 ft. Linear Fluorescent ¹	8' Linear LED	\$20	\$20	per lamp
T8/T12 U-Tube Fluorescent ¹	U-Tube LED	\$9	\$7	per lamp
T5 2 ft. Linear Fluorescent ¹	2' Linear LED	\$2	\$2	per lamp
T5 4 ft. Linear Fluorescent ¹	4' Linear LED	\$5	\$4	per lamp
T5 (high output) 2 ft. Linear Fluorescent ¹	2' Linear LED	\$5	\$4	per lamp
T5 (high output) 4 ft. Linear Fluorescent ¹	4' Linear LED	\$10	\$9	per lamp
High Intensity Discharge (HID) [475W] ²	LED Lamp/Fixture	\$26	\$22	per fixture
High Intensity Discharge (HID) [175 to 250W] ²	LED Lamp/Fixture	\$43	\$36	per fixture
High Intensity Discharge (HID) [251 to 400W] ²	LED Lamp/Fixture	\$98	\$82	per fixture
High Intensity Discharge (HID) [401 to 1000W] ²	LED Lamp/Fixture	\$226	\$188	per fixture
High Intensity Discharge (HID) [>1000W] ²	LED Lamp/Fixture	\$248	\$248	per fixture
LIGHTING: LIGHTING CONTROLS				
No Controls	Daylighting Controller (controlling < 500 watts)	\$15	\$15	per unit
No Controls	Daylighting Controller (controlling ≥ 500 watts)	\$40	\$40	per unit
No Controls	Occupancy Sensor (controlling < 500 watts)	\$20	\$20	per unit
No Controls	Occupancy Sensor (controlling ≥ 500 watts)	\$60	\$60	per unit
No Controls	Occupancy Sensor - Daylighting Control (controlling < 500 watts)	\$25	\$25	per unit
No Controls	Occupancy Sensor - Daylighting Control (controlling ≥ 500 watts)	\$75	\$75	per unit



Updated Prescriptive Measures (on Prescriptive Overview) – updated December 2019



SMALL BUSINESS DIRECT INSTALL OFFERING

Controlling operating costs can be challenging for small businesses, especially in the hot summer months here in New Orleans. Energy Smart has a direct install offering specifically for Entergy New Orleans small business customers to help alleviate this burden. The Small Business Direct Install offering is an excellent way for your business to reduce energy costs and save money.

STEPS TO PARTICIPATE



The Energy Smart SBDI offering makes receiving valuable cash incentives for lighting upgrades easier for Entergy New Orleans small business customers. A streamlined application process and instant discounts mean you realize the incentives immediately. All you do is sign the application and the contractor does the rest.

Small business customers can receive higher incentive rates on SBDI measures for one-for-one retrofits or replacements installed by an approved SBDI Trade Ally. Energy Smart's SBDI incentives lower the upfront project cost so you can start saving today.

ELIGIBILITY:
All commercial customers who receive electrical service from Entergy New Orleans, LLC with peak demand <100 kW are eligible to participate in the Energy Smart Small Business Direct Install Offering.

REQUIREMENTS:

- Installation must be completed by a qualified SBDI Trade Ally.
- All lighting installed must be DLC or ENERGY STAR® listed.
- Applications must be submitted within 30 days of installation.

For information about this and other Energy Smart offerings, visit energysmartnola.com, email info@energysmartnola.com or call 504-229-6868.



SBDI Overview – Front Page

SMALL BUSINESS DIRECT INSTALL OFFERING INCENTIVES



EXISTING EQUIPMENT	EFFICIENT EQUIPMENT	UNIT	SBDI INCENTIVE
CONTROLS/SENSORS			
No Controls	Daylighting Controller (controlling + 500W)	Unit	\$30
No Controls	Daylighting Controller (controlling +- 500W)	Unit	\$85
No Sensors	Occupancy Sensor (controlling + 500W)	Sensor	\$45
No Sensors	Occupancy Sensor (controlling +- 500W)	Sensor	\$120
No Sensors	Occupancy Sensor w/ Daylighting Control (controlling + 500W)	Sensor	\$60
No Sensors	Occupancy Sensor w/ Daylighting Control (controlling +- 500W)	Sensor	\$150
INTERIOR LIGHTING			
CFL pin-base lamp	LED pin-base lamp	Lamp	\$15
CFL/Incandescent Screw-In Lamp	LED A-lamp	Lamp	\$6.50
CFL/Halogen Direction Lamp	LED Directional lamp	Lamp	\$6.50
CFL/Incandescent Downlight	LED Downlight kit	Fixture	\$16
2' Fluorescent T12/T8	2' Linear LED	Lamp	\$6
2' Fluorescent T5	2' Linear LED	Lamp	\$6
2' Fluorescent T5 (HO)	2' Linear LED	Lamp	\$8
4' Fluorescent T12/T8	4' Linear LED	Lamp	\$8.50
4' Fluorescent T12/T8 (HO)	4' Linear LED	Lamp	\$9
4' Fluorescent T5	4' Linear LED	Lamp	\$8
4' Fluorescent T5 (HO)	4' Linear LED	Lamp	\$9
8' Fluorescent T12/T8	Two (2) 4' Linear LED	Lamp (existing)	\$15
8' Fluorescent T12/T8 (HO)	Two (2) 4' Linear LED	Lamp (existing)	\$25
U-tube Fluorescent T12/T8	LED U-tube	Lamp	\$12
+175 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$80
175 W to 250 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$105
250 W to 400 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$150
400 W to 1000 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$300
+1000 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$500
EXTERIOR 24/7 OR GARAGE 24/7 LIGHTING			
+175 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$140
175 W to 250 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$200
250 W to 400 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$300
400 W to 1000 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$600
+1000 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$800
2' Fluorescent T12/T8/T5	2' Linear LED	Lamp	\$8
4' Fluorescent T12/T8/T5	4' Linear LED	Lamp	\$9
8' Fluorescent T12/T8	Two (2) 4' Linear LED	Lamp (existing)	\$40
U-tube Fluorescent T12/T8	LED U-tube	Lamp	\$20
CFL pin-base lamp	LED pin-base lamp	Lamp	\$15
CFL/Incandescent Screw-In Lamp	LED A-lamp	Lamp	\$6.50
CFL/Halogen Direction Lamp	LED Directional lamp	Lamp	\$6.50
CFL/Incandescent Downlight	LED Downlight kit	Fixture	\$7
EXIT SIGN REPLACEMENTS			
Incandescent/CFL Exit Sign	LED Exit Signs (must meet state fire marshal codes/UL rated; +- 5 watts)	Fixture	\$40

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SBDI Overview – Back Page

APPLICATION GUIDE

2019



ENERGY SMART SMALL BUSINESS DIRECT INSTALL OFFERING



SBDI Application Form

2019 ENERGY SMART PROGRAM APPLICATION OVERVIEW SMALL BUSINESS DIRECT INSTALL OFFERING



The Energy Smart Small Business Direct Install offering is available to all commercial customers that receive service from Entergy New Orleans, LLC and have a peak demand of <100 kW. Energy Smart works with business owners, facility managers and trade ally contractors to identify energy efficiency opportunities, offer technical assistance to develop cost-effective projects and provide cash incentives for completing eligible upgrades with proven energy savings.

Customers can receive prescriptive incentives on one-for-one retrofits or replacements of eligible SBDI measures installed by an approved SBDI Trade Ally. If a project is not installed by an approved SBDI Trade Ally, the project is not eligible for the SBDI incentive rates.

For any questions regarding the SBDI offering and for assistance with finding a qualified trade ally, contact us at Info@energysmartnola.com or 504-229-6868.

BEFORE YOU APPLY:

Verify customer eligibility

- All commercial customers who receive electric service from Entergy New Orleans, LLC with peak demand <100 kW are eligible to participate in the Energy Smart Small Business Direct Install offering.
- Review the Terms and Conditions starting on page six or available online at energysmartnola.com/businesses/terms.

Project application process

1. Find and contact an approved SBDI Trade Ally.
2. Trade Ally installs measures.
3. Trade Ally submits application and documents within 30 days of install.

Required documentation

- Completed Energy Smart SBDI Offering Application.
 - *Verify that all fields are completed. Incomplete applications cannot be processed.
 - *Completed Small Business Direct Install measure list with quantities installed.
- Copy of recent Entergy New Orleans bill.
- Cut sheet or manufacturer specification sheet.
 - *Include a cut sheet or manufacturer specification sheet for all equipment installed as part of the project.
- Project invoice with incentive discounted off of the final amount owed.

SUBMIT YOUR APPLICATION:

Mail or email your application and all supporting documentation. Please retain a copy of the application for your records.

Energy Smart Commercial & Industrial Offering
900 Camp Street, Suite 364
New Orleans, LA 70130
504-229-6868
commercialapps@energysmartnola.com



2019 OFFERING APPLICATION

Please complete all sections. Incomplete applications cannot be processed and will delay payment of incentives.



CUSTOMER TYPE

Small Commercial

PROJECT TYPE

Direct Install

ACCOUNT AND CUSTOMER INFORMATION

Has this Entergy account been opened within the last eight weeks?

Yes No

Company Name

Legal Address (as shown on company W-9)

City

State

ZIP

How did you hear about us? Check all that apply.

- Utility
- Trade Ally
- Website
- E-mail
- Trade Show/Event
- Direct Mail
- Other: _____

Who did you work with from Energy Smart on this project? (contact name)

CUSTOMER CONTACT INFORMATION

Customer Contact Name

Primary Phone Number

Email Address

JOB SITE INFORMATION

Please refer to your utility bills for account numbers below.

Job Site Business Name

Electric Account number

- Job site address is same as legal address.
- Job site address is different (complete below).

Job Site Address

City

State

ZIP

TRADE ALLY CONTRACTOR INFORMATION

Trade Ally Contact Name

Primary Phone Number

Email Address

Company Name

Registered Trade Ally

Yes No

Address

City

State

ZIP

PAYMENT INFORMATION

A form W-9 is required for the payee.

Make incentive check payable to:

Trade Ally

Mail check to:

- Legal Address
- Alternate Address (complete below)

Address

City

State

ZIP

Attention to (if applicable)



SBDI Application Page 3

PROPERTY INFORMATION

BUSINESS PROPERTY TYPE

SELECT ONE PROPERTY TYPE THAT BEST DESCRIBES YOUR BUSINESS:

- Existing Building
Assembly or Entertainment/Recreation
College or University
Fast Food Restaurant
Full Menu Restaurant
Grocery and Convenience
Health Clinic or Hospital
Small Office
Large Office
Lodging
Religious or Faith-Based
Retail
K-12 School
Gas Station
Government
Automotive Services
IT/Data Center
Parking Garage
Industrial or Manufacturing
Warehouse
Exterior
Other

BUILDING HEATING & COOLING SYSTEM

WATER HEATING SYSTEM TYPE

- A/C with Electric Resistance Heat
A/C with Natural Gas Heat
A/C with No Heat
Heat Pump
Unconditioned
Not Applicable
Electric
Natural Gas
Oil
Propane
Steam
Other
Not Applicable

Year Built:
Square Footage:
Ownership: Rent Own Lease

PROJECT BACKGROUND INFORMATION

Installation Completed Date (mm/dd/yyyy):

Required documentation:

- Completed Energy Smart SBDI Offering Application.
* Verify that all fields are completed. Incomplete applications cannot be processed.
* Completed Small Business Direct Install measure list with quantities installed.
Copy of recent Entergy New Orleans bill.
Cut sheet or manufacturer specification sheet.
* Include a cut sheet or manufacturer specification sheet for all equipment installed as part of the project.
Project Invoice with incentive discounted off of the final amount owed

Additional data may be requested to process your application.

Brief Project Description:

Site photographs and a site inspection may be required by the program. A program representative may be contacting you to request this information and request an on-site visit.

UNDER PENALTY OF PERJURY, I CERTIFY THAT:

I have read and agree to the provisions set forth herein and to the Terms and Conditions. I understand that Energy Smart may revise these Terms and Conditions at any time and I will not be notified in the event changes are made. To the best of my knowledge, the statements made on this application are complete, true and correct.

Customer Signature Name (print) Date



ENERGY SMART NEW ORLEANS SMALL BUSINESS DIRECT INSTALL:

Request For Qualifications for Small Business Direct Install Offering Services



OFFERING DESCRIPTION:

Energy Smart requests a written Statement of Qualifications from trade allies interested in participating as a Small Business Direct Install service provider. This offering will require selected SBDI service providers to perform assessments and installation of energy efficient equipment in non-residential Entergy New Orleans electric customer facilities that would qualify for the Energy Smart Small Commercial Solutions offering (average monthly demand of less than 100 kW). APTIM will be the program administrator for the SBDI offering as part of the Energy Smart Energy Efficiency program.

Trade allies responding to this Request for Qualifications that meet all offering qualifications will be considered for participation as one of the Energy Smart's qualified SBDI service providers. After review of submitted SOQs, the program will select service providers to participate in the SBDI offering. The program will provide a dedicated SBDI incentive application which all selected service providers are required to utilize to complete site assessments and receive incentives. The program will also provide training on the processes, tools, measures and requirements for the SBDI offering. Program staff may conduct site inspections to ensure that the work was performed in compliance with the offering guidelines. Trade allies who qualify as service providers may receive additional support in the form of marketing materials and project leads.

The SBDI offering is designed to help Entergy New Orleans small business customers by identifying energy saving opportunities at their facilities through assessments and realized energy savings at a reduced cost through the use of enhanced utility incentives. Targeted facilities will include all business types that qualify for the Energy Smart Small Commercial Solutions offering. In addition to incentives specifically designed for small businesses, customers will have access to the entire portfolio of Energy Smart non-residential incentives.

The program's approach is to use a small group of highly focused SBDI service providers in order to identify and implement cost-effective energy saving measures and provide small business owners information on additional Energy Smart incentives. The program will encourage the use of special small business incentives designed to reduce the upfront costs required to complete energy saving lighting retrofits. The program is also intended to create additional energy awareness within small businesses and promote energy use reduction as an avenue to reduce costs, increase margins and stay competitive.

Only fully qualified trade allies that become selected SBDI service providers will be approved to deliver SBDI offering services. The recruitment and training process for approved SBDI service providers is outlined below:

- Potential SBDI service providers must be a member in good standing of the Energy Smart Commercial and Industrial Trade Ally Network.
- Potential SBDI service providers must respond to this RFQ to ensure qualifications are met.
- Potential SBDI service providers have a proactive sales team.
- Must have existing small business clients in the Entergy New Orleans service territory.
- Must have experience with lighting technologies and familiarity with non-lighting energy efficiency opportunities.
- Willingness to complete walk through equipment inventory assessments.
- Commitment to follow up on customer project inquiries provided from the program staff.
- Selected SBDI service providers will participate in all of the following training activities:
 - * **Initial Training** - mandatory for all SBDI service providers. The initial training will cover offering requirements, procedures and protocols, incentives, participation processes, and other details needed to implement energy savings measures. All personnel within the selected organization are required to attend this training. This includes sales, assessment, installation, and administrative personnel. All new staff is required to complete the initial training prior to performing work under the SBDI offering.
 - * **Supplemental Training** - conducted as needed, upon request, or for SBDI service providers that are deemed in need of further training.

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ENERGY SMART NEW ORLEANS SMALL BUSINESS DIRECT INSTALL: Request For Qualifications for Small Business Direct Install Offering Services



SCOPE OF WORK:

Facility Identification and Engagement

The SBDI service providers identify small businesses that could benefit from the reduction of energy use associated with lighting retrofits. They should also identify additional lighting and non-lighting energy saving opportunities that could receive incentives via the Energy Smart program. A dedicated SBDI application will be provided to quickly review and record equipment inventory and replacements within a facility.

Measure Implementation

The SBDI service providers will support the implementation of measures by either implementing directly or utilizing a qualified installer to complete installations. The installation can include small business measures, other measures within the Energy Smart Small Commercial Solutions offering or other non-incentivized measures. All measures must be installed and operational in the quantities shown on the application before any incentives are paid. Only measures that qualify for incentives under the offering are eligible to receive an incentive.

Site Surveys and Inspections

SBDI projects are subject to site surveys and inspections upon completion. The program reserves the right to deny an incentive payment for work found to be unsatisfactory. Any inspection found unsatisfactory can result in the removal as a service provider from the SBDI offering. Program staff will conduct inspections to ensure that the work was performed in compliance with offering guidelines.

Incentive Structure

The SBDI offering incentives are prescriptive in nature and will be paid on a one-for-one unit replacement basis at the current offering rates. Incentives are capped at 100% of documented measure implementation costs. Participants will have 30 days from installation of measures to submit the incentive application and all appropriate supporting documentation.

Incurred Costs

The program is not responsible for costs incurred by any respondent to this RFQ. Once submitted, proposals will not be returned to respondents. The program reserves the right to reject any or all responses to this RFQ.

No Guarantee of Work

The acceptance of a firm's SOQ does not guarantee work.

The final decision will be made by the program administrator on its sole and absolute discretion.

SUBMITTAL:

Prospective SBDI service providers should submit an electronic copy of this form to commercialapps@energysmartnola.com.

Questions regarding this RFQ can be directed to:

Kevin Fitzwilliam

Kevin.Fitzwilliam@aptim.com



**ENERGY SMART NEW ORLEANS
SMALL BUSINESS DIRECT INSTALL:**
Request For Qualifications for Small Business Direct Install Offering Services



APPENDIX A: STATEMENT OF QUALIFICATIONS

COMPANY:			
ADDRESS:			
	City:	State:	ZIP:
CONTACT NAME:			
TITLE:			
PHONE:			
FAX:			
EMAIL:			

What percentage of your business is currently performed in New Orleans?

What percentage of your business currently comes from small businesses (less than 100 employees)?

Please list your total number of employees in New Orleans based on the following categories:

BUSINESS CATEGORY	TOTAL NUMBER OF EMPLOYEES
Sales:	
Installation:	
Service:	
Management/ Administration:	

What types of lighting equipment retrofits do you specialize in?

What brands of equipment do you typically sell?

What percent of the products you sell are on the Design Lights Consortium or ENERGY STAR® qualified product lists?

Do your products carry any other certifications? Yes No *If yes, which do they carry?*



**ENERGY SMART NEW ORLEANS
SMALL BUSINESS DIRECT INSTALL:**
Request For Qualifications for Small Business Direct Install Offering Services



Do you complete all your installations using in-house resources? Yes No

If not, please complete the installation contractor information below. Provide proof of insurance for all installation contractors if they are not registered Energy Smart trade allies.

INSTALLATION CONTRACTOR #1

COMPANY:			
ADDRESS:	City:	State:	ZIP:
CONTACT NAME:			
TITLE:			
PHONE:			
FAX:			
EMAIL:			
LENGTH OF RELATIONSHIP:			
ENERGY SMART TRADE ALLY?			

INSTALLATION CONTRACTOR #2

COMPANY:			
ADDRESS:	City:	State:	ZIP:
CONTACT NAME:			
TITLE:			
PHONE:			
FAX:			
EMAIL:			
LENGTH OF RELATIONSHIP:			
ENERGY SMART TRADE ALLY?			

Please list any additional installation contractor information on a separate page.

What type of warranty do you typically offer on your products?

What type of warranty do you typically offer on your labor/workmanship?



**ENERGY SMART NEW ORLEANS
SMALL BUSINESS DIRECT INSTALL:**
Request For Qualifications for Small Business Direct Install Offering Services



ADDITIONAL COMMENTS

Use this page to document any additional information you wish to include regarding your qualifications or experience doing this type of work.



SMALL BUSINESS DIRECT INSTALL OFFERING INCENTIVES



EXISTING EQUIPMENT	EFFICIENT EQUIPMENT	UNIT	SBDI INCENTIVE
CONTROLS/SENSORS			
No Controls	Daylighting Controller (controlling < 500W)	Unit	\$30
No Controls	Daylighting Controller (controlling >= 500W)	Unit	\$85
No Sensors	Occupancy Sensor (controlling < 500W)	Sensor	\$45
No Sensors	Occupancy Sensor (controlling >= 500W)	Sensor	\$120
No Sensors	Occupancy Sensor w/Daylighting Control (controlling < 500W)	Sensor	\$60
No Sensors	Occupancy Sensor w/Daylighting Control (controlling >= 500W)	Sensor	\$150
Interior Lighting			
CFL pin-base lamp	LED pin-base lamp	Lamp	\$15
CFL/Incandescent Screw-In Lamp	LED A-lamp	Lamp	\$6.50
CFL/Halogen Direction Lamp	LED Directional lamp	Lamp	\$6.50
CFL/Incandescent Downlight	LED Downlight kit	Fixture	\$16
2' Fluorescent T12/T8	2' Linear LED	Lamp	\$6
2' Fluorescent T5	2' Linear LED	Lamp	\$6
2' Fluorescent T5 (HO)	2' Linear LED	Lamp	\$8
4' Fluorescent T12/T8	4' Linear LED	Lamp	\$8.50
4' Fluorescent T12/T8 (HO)	4' Linear LED	Lamp	\$9
4' Fluorescent T5	4' Linear LED	Lamp	\$8
4' Fluorescent T5 (HO)	4' Linear LED	Lamp	\$9
8' Fluorescent T12/T8	Two (2) 4' Linear LED	Lamp (existing)	\$15
8' Fluorescent T12/T8 (HO)	Two (2) 4' Linear LED	Lamp (existing)	\$25
U-tube Fluorescent T12/T8	LED U-tube	Lamp	\$12
<175 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$80
175 W to 250 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$105
251 W to 400 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$150
401 W to 1000 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$300
>1000 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$500
Exterior 24/7 or Garage 24/7 Lighting			
<175 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$140
175 W to 250 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$200
251 W to 400 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$300
401 W to 1000 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$600
>1000 W HID (lamp wattage)	LED Lamp/Fixture	Fixture	\$800
2' Fluorescent T12/T8/T5	2' Linear LED	Lamp	\$8
4' Fluorescent T12/T8/T5	4' Linear LED	Lamp	\$9
8' Fluorescent T12/T8	Two (2) 4' Linear LED	Lamp (existing)	\$40
U-tube Fluorescent T12/T8	LED U-tube	Lamp	\$20
CFL pin-base lamp	LED pin-base lamp	Lamp	\$15
CFL/Incandescent Screw-In Lamp	LED A-lamp	Lamp	\$6.50
CFL/Halogen Direction Lamp	LED Directional lamp	Lamp	\$6.50
CFL/Incandescent Downlight	LED Downlight kit	Fixture	\$17
Exit Sign Replacements			
Incandescent/CFL Exit Sign	LED Exit Signs (must meet state fire marshal codes/UL rated; <= 5 watts)	Fixture	\$40

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Residential Collateral

Thank you for ordering an Energy Efficiency Kit from Energy Smart.

Energy Smart would like your feedback regarding your experience receiving and installing your Energy Efficiency Kit with ENERGY STAR® certified products. Simply fill out this postage-paid reply card and drop it in the mail at your convenience. Or, if you prefer to take this survey online, visit energysmart.eekits.energysmartfeedback.com. Please call 504-229-6868 if you have any questions. Be sure to tell your family and friends about participating in Energy Smart.

Please rate the questions below on a scale of 1 to 10.

1 = Highly Unsatisfied/Strongly Disagree. 10 = Highly Satisfied/Strongly Agree.

	Lowest	→ Highest								
	1	2	3	4	5	6	7	8	9	10
Overall, how satisfied were you with your kit?	<input type="radio"/>									
How satisfied were you with the products included in your kit?	<input type="radio"/>									
How satisfied were you with the turnaround time it took to receive your kit?	<input type="radio"/>									
How satisfied were you with the process of requesting a kit?	<input type="radio"/>									
How likely is it that you would recommend the program to a friend or colleague?	<input type="radio"/>									
How satisfied were you with the ease of installing the products in your kit?	<input type="radio"/>									

Yes, I would like to receive emails about other Energy Smart offerings.
 Email: _____

What motivated you to participate? (Select all that apply.)

- Items were free of charge.
- Wanted to reduce my utility bill.
- Wanted to help the environment.
- Referral from a friend or family member.
- Other _____

Additional feedback:

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EE Kits Survey BRC: to be included when the Energy Efficiency Kits are sent to customers through the HPwES offering so they can provide their feedback on their experience with the kit. Online version of the survey in development now so these haven't been distributed. BRC complete December 2019.

Sign Up to Win a

FREE Smart Thermostat



Need not be present to win. One thermostat per household. Must be a qualified Entergy New Orleans customer to win. Thermostat type subject to availability. Energy Smart is a comprehensive energy-efficiency program developed by the New Orleans City Council and administered by Entergy New Orleans, LLC. ©2019 Entergy Services, LLC. All Rights Reserved.

Smart Thermostat Promo Table Top Sign: used at outreach events to sign people up for HPwES and enter them to win a smart thermostat with free installation. Completed October 2019.



504-229-6868
energysmartnola.com
info@energysmartnola.com

Thank you for your participation in the Energy Smart EasyCool offering. Because of your actions, you've made an important contribution to reducing energy demand, benefiting the environment and keeping electric costs more affordable.

For the most part, electrical bills reflect two basic components: the electrical requirements of the appliances in a home (watts) and the length of time those appliances are used (hours). During the summer when air conditioning is used the most, it's common for both of those components to reach their highest demand, or "peak demand." Your participation in the Entergy New Orleans EasyCool offering helps ease those peak demand costs when temperatures are at their most extreme. It also supports our commitment to providing you with safe, affordable and reliable service.

To thank you for using energy wisely during the 2019 cooling season, **we're enclosing this \$40 check.**

If you have a question about the offering, please call the number listed below. We also would appreciate you visiting energysmart.easycool.energysmartfeedback.com to take a short survey. Your responses can help us improve our programs and services. Thank you again for participating in the Energy Smart EasyCool offering.

Sincerely,
Your Energy Smart EasyCool Offering Team

P.S. To learn more ways to save energy and money, visit energysmartnola.com or call us at **504-229-6868**.

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End of Season Letter for EasyCool: sent to customers who participated in 2019 EasyCool to let them know they'd receive their participation incentive. These letters were completed and sent out end of November, beginning of December 2019.



Google Display Ads that ran between November 6 and December 20, 2019.



Facebook ad that ran between November 6 and December 20, 2019.



Switching to a smart thermostat is easier than you think.

Call 504-229-6868 to receive your FREE smart thermostat.

We'll come to your home and install your smart thermostat for free.



Five ways a smart thermostat can improve your home's comfort:

1. **Update temps remotely.** Using the app on your phone, you can adjust your smart thermostat from anywhere. This can help you adjust the temperature in your home as the weather or your plans change, which helps your home use less energy.
2. **Adjust temperature based on your preferences.** Your smart thermostat will learn your preferences and adjust the temperature of your home to help keep you comfortable.
3. **Send notifications.** Unlike your programmable thermostat, your smart thermostat will notify you if your heating and cooling system is experiencing any issues.
4. **Keep your connected.** For customers with digital assistants or smartwatches, you can connect your smart thermostat to these devices for a more integrated experience.
5. **Control your whole house.** In addition to the control on your phone, you can get sensors so your smart thermostat can adjust your room's temperature based on activity in the room.

For more information, email info@energysmartnola.com or call 504-229-6868.

Smart Thermostat Promotion email sent out as part of a nurture email to gas service customers who participated in the Home Performance with ENERGY STAR® or Income Qualified Weatherization. This email was sent out on December 11.



Remember to call us about receiving a smart thermostat for your home. Installation is free and we can tell you about [other energy-saving opportunities](#) with Energy Smart.

Call 504-229-6868 to receive your FREE smart thermostat.



For more information, email info@energysmartnola.com or call 504-229-6868.

Second email in the Smart Thermostat Promotion. This was sent to customers who opened the first email that was sent on December 11. This email was sent on December 16.



Celebrate efficiency with free energy-saving products.

Bring the energy-saving party to your house with a Home Performance with ENERGY STAR® assessment. Some benefits you'll see when you schedule your free assessment:

- Reduces the up-front cost of installing energy-efficiency upgrades in your home.
- You could save up to 20% or more on your annual utility bill.

Ready to start saving?



Your Appointment

We'll conduct a full assessment of your home, recommend ways to save energy and provide a free installation of energy-saving products such as:

- LED light bulbs.
- Faucet aerators.
- Low-flow showerheads.
- Smart power strips.

Schedule Your Appointment ►



Additional Upgrades

Once your assessment is completed, work with an Energy Smart [qualified trade ally](#) to make the energy-efficient upgrades listed on your audit recommendations. Your selected trade ally will:

- Provide an estimate for the upgrades mentioned in your assessment.
- Help you identify specific rebates you may qualify for based on your recommended upgrades.

For more information on Home Performance with ENERGY STAR and other energy-saving opportunities, visit energysmartnola.com or call 504-229-6868.

Home Performance with ENERGY STAR promotional email targeting customers who participated in EasyCool or A/C Tune-up but hadn't yet participated in HPwES. Sent out on November 12.



Keep the savings party going with a Home Performance with ENERGY STAR® assessment.



Save more with a free personalized assessment of your home.

Build on the energy savings you experienced with your Energy Efficiency Kit by scheduling a [Home Performance with ENERGY STAR assessment](#). You'll receive a whole-house assessment to evaluate your home's energy efficiency needs and free installation of energy-saving products such as energy-efficient light bulbs, water-saving showerheads and more.

[Schedule Your Appointment](#) ▶

For more information about this and other energy efficiency programs, visit energysmartnola.com, email info@energysmartnola.com or call 504-229-6868.

Email sent out on October 29 promoting the Home Performance with ENERGY STAR offering to customers who had received an energy efficiency kit but had not yet participated in the full assessment.

Appendix E: Program Photos

Outreach Events



October STEM Fest



October STEM Fest



November Irish Channel Neighborhood Association Meeting



November Central Circle Meeting



December LA Green Corps Meeting, Toulouse and Broad St.



December TCA Super LiHEAP Day



December Entergy Renewable Portfolio Meeting

