



**ELECTRIC & GAS INDUSTRIES ASSOCIATION**

*Bringing Energy Efficiency Home . . .*

# **BUILDING A HIGH PERFORMANCE CONTRACTOR NETWORK**

**Wyoming  
Utility Efficiency Exchange**

**March 5-6, 2009**

# EGIA Brings All Facets Of The Home Improvement Market Together Towards One Common Goal ...*Enhanced Energy Efficiency!*

The **Electric & Gas Industries Association** is a non-profit organization with a mission to advance energy efficiency and renewable energy solutions through a nationwide network of manufacturers, distributors, utility & state energy efficiency program sponsors and thousands of home improvement contractors

## Energy Efficiency Program Administration

Rebate & Financing Program Administration \* Retailer/ Contractor Training \* Strategic Planning  
Industry Advocacy \* Utility Exchange \* Home Makeover Contests \* Contractor Screening & Approval

## Manufacturer / Distributor

National Program Development  
Joint Marketing \* Dealer/ Contractor Sales Training

## Industry Advocacy

Industry Advocacy \* Sales & Marketing Support  
Market Development

## Contractor Direct Programs

Buying Group Financing \* Marketing Support \* Contractor Exchange  
Sales Training \* Approved Contractor Marketing Program \* Customer Referral Program

# UTILITY & STATE SPONSORED PROGRAM ADMINISTRATION

## Rebate Program Administration & Income Verification

- *Processed 2.5 Million Rebates & Disbursed Over \$250 Million In Rebate Checks*

## Energy Efficiency & Renewable Energy Financing

- *Financing Of Over \$450 Million In Home & Business Efficiency Upgrades*

## Contractor Network Development, Screening & Management

- *Manage Utility Sponsored Contractor Networks & A Nationwide Membership Network Of Over 2500 Home Improvement and Solar Contractors*

## Home Energy Makeover Contest Administration

- *Support Services Ranging From Design Consulting To Procurement/ Donation Of Installed High Efficiency Measures To Full Program Administration*

## Utility Exchange/ Contractor Exchange Services

- *UtilityExchange.org Plans and Produces Activities Where Utilities and Allied Organizations Learn and Network Regarding Energy Efficiency, Demand Response, Renewable Energy, Customer Service, Marketing/Sales and Enhanced Business Operations*

# CONTRACTOR NETWORK DEVELOPMENT PROCESS

*Building A High Performance Contractor Network*



**GIVE CONTRACTORS THE TOOLS THEY NEED TO GROW AND  
THEY WILL HELP YOU SUCCEED!**

***“Before Leaders Become Big And Tall,  
They Were All Once Short And Small”***



**Strong Utility Sponsored Contractor Networks Are Not Only Critical To The Success  
Of Your Energy Efficiency Programs, But Also Help Support Area Job Creation And  
Enhance The Economic Vitality Of The Communities You Serve**

# CONTRACTOR RECRUITING

*Reach Out To The Broadest Cross Section Of Your Contractor Base*

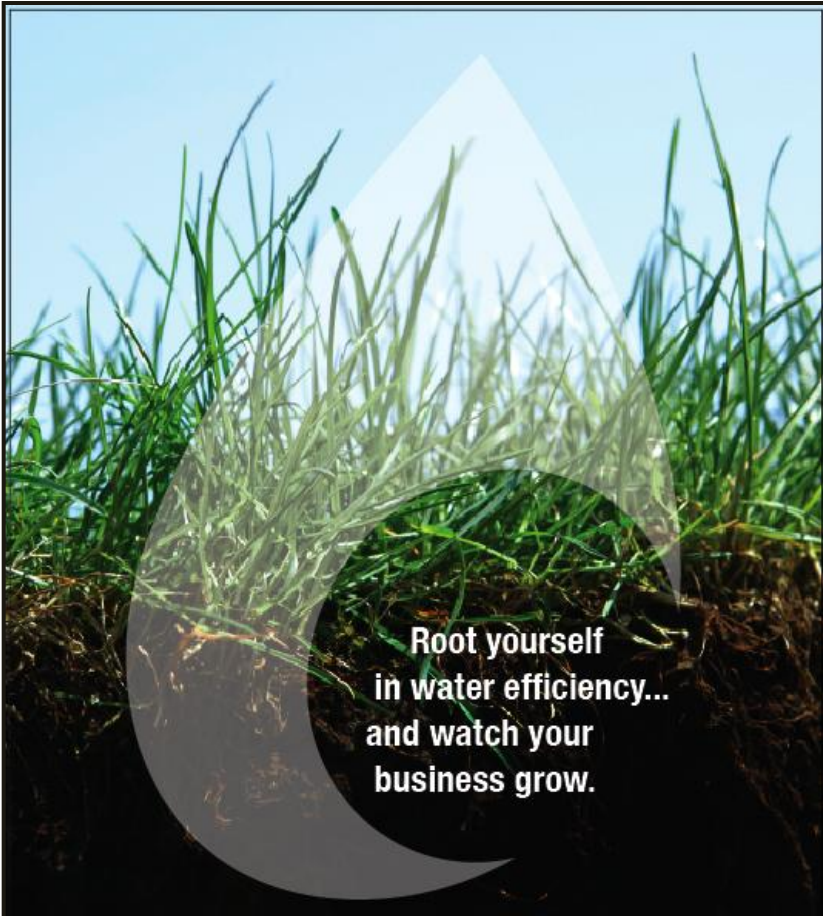


- **State Contractor Licensing Organizations**
- **Past Utility Program Participants**
- **Manufacturers & Distributors**
- **Local/ National Trade Organizations** (*NARI, NAHB, ACCA, SEIA, EGIA*)
- **Chamber of Commerce & Business Organizations**
- **Yellow Pages/ Media Advertising Publications**
- **Purchased Contact Lists**



# CONTRACTOR RECRUITING

*Using Creative Imagery To Capture Contractors Attention Through Print Advertising or Direct Mail Marketing Outreach*



**Root yourself  
in water efficiency...  
and watch your  
business grow.**

SoCal WaterSmart offers water efficiency rebates to residential customers (or their contractors) for rotating nozzles, weather-based irrigation controllers, and synthetic turf.

For more information or to get a set of rebate applications, go to [www.bewaterwise.com](http://www.bewaterwise.com)



Sponsored by the Metropolitan Water District of Southern California and the Family of Southern California Water Agencies



**Southern California is  
on Water Supply Alert**

- Record low precipitation for 8 of the last 9 years
- Environmental issues have led to supply cuts of 30%
- Growing population increases regional demand

## Fast Facts for Contractors

SoCal WaterSmart efficient landscape technologies save water for your residential customers and offer opportunities for your business.



### REBATE SUMMARY

Residents of single family homes served by participating water agencies are eligible for rebates for installing the following water-efficient outdoor products:

#### Weather-Based Irrigation Controllers

Less than 1 acre of irrigated landscape ..... starting at **\$80/controller**

More than 1 acre of irrigated landscape ..... starting at **\$630/acre**

Rotating Nozzles ..... starting at **\$4/nozzle**

Synthetic Turf ..... starting at **\$0.30/sq ft**

### Smart for Your Customers

- 🕒 **SAVE TIME**
- 💰 **SAVE MONEY**
- 💧 **SAVE WATER**

### Smart for Your Business

- 📈 **BOOST SALES**
- 💰 **INCREASE PROFITS**
- ✅ **PROVIDE QUALITY SERVICES**



THE METROPOLITAN WATER DISTRICT  
OF SOUTHERN CALIFORNIA  
AND THE FAMILY OF SOUTHERN CALIFORNIA WATER AGENCIES

For more information, visit [www.bewaterwise.com](http://www.bewaterwise.com)

## *The Stage For Success*

### Contractor Open House/ Program Orientation Meeting

- Review Program Process, Requirements & Services Available To Trade Allies. Typical Agenda Could Include:
  - Efficiency Program Overview, Program Application Process And Review Of Customer Marketing & Contractor Sales Tools
  - Quality Control Procedures & Program Technical Requirements
  - Introduce Cooperative Marketing Incentives (If Applicable)
  - Describe Available Financing Options For Customers
  - Discuss Contractor Network Participation Requirements & Penalties For Non-Performing Contractors
  - Announce Awards Program For High Performers



**Treat Them Like Insiders And Give Them Privileged Information About Your Programs And Where They Are Headed.**

# TRADE ALLY PROGRAM ORIENTATION

Southern California Edison's A/C Quality Program is giving away **\$37 million** in contractor incentives.

How much will *you* claim?



## A/C Quality Contractor Orientation Workshops

### Wednesday, March 14

11:00 am – 2:00 pm  
Radisson Whittier  
7320 Greenleaf Ave.  
Whittier, CA 90602

### Wednesday, March 21

11:00 am – 2:00 pm  
Hilton Hotel  
225 West Valley Blvd.  
San Gabriel, CA 91776

### Thursday, March 15

11:00 am – 2:00 pm  
Holiday Inn – Palmdale  
38630 5<sup>th</sup> St. West  
Palmdale, CA 93551

### Thursday, March 22

11:00 am – 2:00 pm  
San Bernardino Hilton Hotel  
285 N. Hospitality Lane  
San Bernardino, CA 92408

Call: **800.378.7503** to reserve your spot.

Or visit: [www.ac-quality.com](http://www.ac-quality.com)

Can't make any of these dates? Check the website for updates on additional workshops scheduled!



This program is funded by California utility ratepayers and administered by Southern California Edison Company under the auspices of the California Public Utilities Commission, through a contract awarded to the Conservation Services Group. California customers who choose to participate in this program are not obligated to purchase any additional services offered by the contractor. The trademarks used herein are the property of their respective owners.



Benefits of the A/C Quality Program for:

## Residential Contractors

### How can I benefit from participating in A/C Quality's residential measures?

A/C Quality's residential measures are designed to increase residential contractors' profitability while improving residential split and packaged A/C system efficiency. The program measures are: Residential Early Retirement and Residential Services.



#### Residential Early Retirement Benefits:

- Shortened sales cycles
- Increased profit margins from high efficiency equipment
- Opportunity to combine A/C Quality and manufacturer incentives to close more sales

Incentives range from \$345 – \$750 per unit!

#### Residential Services Benefits\*:

- Expanded billable services
- Reduced callbacks
- Stabilized business during slow seasons

\*Services include refrigerant charge adjustment (RCA), condenser coil cleaning, ductwork inspection and new construction RCA.

Incentives range from \$75 – \$285 per unit!

### How do I participate in A/C Quality's residential measures?

- 1 Call the A/C Quality Contact Center at: 800.378.7503 and request an enrollment packet.
- 2 Provide your customers with premium efficiency equipment and quality services, according to A/C Quality guidelines.
- 3 Collect A/C Quality incentives and watch your business grow.



Call Today at: **800-378-7503**  
or visit: [www.ac-quality.com](http://www.ac-quality.com)

# CONTRACTOR SCREENING & APPROVAL



## Contractor Opportunity Sheet

### Why Should You Complete The Dealer Application Today To Participate In The Express Loan Program?

It's simple. The GEO Smart Loan Program can:

- Help INCREASE your SALES
- Give your customers a QUICK & EASY payment option
- Help customers decide to BUY from YOU NOW and not from your competitors

### How Can You Make Sure You Achieve These Results?

When you offer the GEO Smart Express Loan Program with Same-As-Cash promotions to all your prospective customers. You'll...

Significantly increase sales by:

- Getting more sales leads
- Closing more sales
- Increasing the average gross profit per job (by upgrading customers to more extensive projects or higher quality equipment and materials)
- Getting a higher loan approval rate

Get a quick and easy application process with:

- No paperwork for you and your customers
- A convenient referral to a paperless, loan-by-phone number
- Extended loan center hours open when you frequently meet with your customers
- Quick credit decision in less than 10 minutes

Get quick payment for completed jobs.

Save money with low SAC dealer fees

### Does Your Company Qualify?

	Yes	No
In business at least 5 years	<input type="checkbox"/>	<input type="checkbox"/>
Minimum net worth of \$50,000	<input type="checkbox"/>	<input type="checkbox"/>
Satisfactory business credit report	<input type="checkbox"/>	<input type="checkbox"/>
No unpaid tax liens or judgments in excess of \$5,000 without acceptable explanation	<input type="checkbox"/>	<input type="checkbox"/>
Three satisfactory trade references with at least two exceeding \$5,000	<input type="checkbox"/>	<input type="checkbox"/>
No bankruptcy in the past 5 years	<input type="checkbox"/>	<input type="checkbox"/>
General liability insurance coverage	<input type="checkbox"/>	<input type="checkbox"/>
Workers' compensation insurance coverage	<input type="checkbox"/>	<input type="checkbox"/>
Contractor licenses, as required by law	<input type="checkbox"/>	<input type="checkbox"/>
Satisfactory bank reference	<input type="checkbox"/>	<input type="checkbox"/>
No unresolved claims with the Better Business Bureau	<input type="checkbox"/>	<input type="checkbox"/>

**If you meet all of the above qualifications, you are eligible to apply for enrollment within the GEO Smart Express Loan Program.**

### GEO Smart Express Loan Program Sign-Up Instructions

Complete And Sign The Enclosed Application And Submit It To EGIA Along With The Required Supporting Documentation. Incomplete Applications Will Not Be Processed. If You Have Any Questions, Call (866) 367-3442 ext. 339

Fax Or Mail Your Completed Sign-Up Materials And Supporting Documentation To EGIA At:

Electric & Gas Industries Association  
3800 Watt Avenue, Suite 105  
Sacramento, CA 95821  
Fax: (800) 506-9073

The Electric & Gas Industries Association is a non-profit organization dedicated to advancing energy efficiency and renewable solutions through a network of utility, manufacturer & distributor partners along with specially screened and approved home improvement contractors.

## DETERMINE STRENGTH OF BUSINESS

- 3-5 Years In Business
- \$200,000 In Annual Sales and/or Minimum \$50,000 Net Worth
- Contractor Licenses Required By Law
- No Unresolved Claims with Better Business Bureau
- Satisfactory Trade References
- Satisfactory Business Credit Report
- General Liability and Workers' Compensation Insurance

## PROGRAM PARTICIPATION AGREEMENT

- Program Participation Requirements
- Branding & Advertising Guidelines
- Quality of Service & Customer Satisfaction Requirements

# CONTRACTOR SCREENING & APPROVAL



## Contractor Application

**IMPORTANT NOTE** Prior to completing this application, please review the "Do You Qualify?" section of the attached Express Loan Contractor Opportunity Sheet. If you meet these qualifications, then complete this contractor application. If you have any questions about these qualifications, please call the Electric & Gas Industries Association at (800) 367-3442 ext. 339

### THE FOLLOWING MUST BE SUBMITTED WITH THIS APPLICATION

1. Company's balance sheet and income statement for most recent year-and (and most recent month/year to date if more than 6 months old).
2. Copies of business licenses referenced in Section V.
3. Copies of insurance summary pages referenced in Section VIII.
4. Articles of incorporation or organization (first page only) and copies of any db/a filings.

#### I. FIRM'S LEGAL NAME

Firm's Trade or db/a Name (if any) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Telephone \_\_\_\_\_ E-mail Address \_\_\_\_\_  
 Fax No. \_\_\_\_\_ Federal Tax ID Number \_\_\_\_\_

#### II. FIRM'S LEGAL STATUS (check appropriate box)

Corporation State of Incorporation \_\_\_\_\_  
 Limited Liability Company State of Organization \_\_\_\_\_  
 Sole Proprietorship Owner's Name \_\_\_\_\_  
 Assumed Business Name (db/a) \_\_\_\_\_  
 Partnership ( ) General ( ) Limited Partners' Names \_\_\_\_\_

#### III. OFFICERS AND KEY PERSONNEL

Attach additional information on separate sheet if necessary.

Name	Rank	Title
Home Address	Home Address	Home Address
Home Phone	Home Phone	Home Phone
SSN	SSN	SSN
DOB	DOB	DOB

#### IV. BUSINESS INFORMATION

Headquarters Location \_\_\_\_\_  
 Total Number of Offices \_\_\_\_\_ Year Established \_\_\_\_\_ Number of Employees \_\_\_\_\_  
 Description of Services Provided and/or Products Sold \_\_\_\_\_  
 \_\_\_\_\_  
 Geographic Area Served \_\_\_\_\_  
 Predecessor Firms Names and Dates within Past 10 Years \_\_\_\_\_

#### V. LICENSES

Attach copies of all business licenses required by law. (e.g. contractors, mechanical, electric, plumbing, etc.)

Continue To Page 2

#### VI. BANK REFERENCE

Bank Name \_\_\_\_\_  
 Contact \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Type of Accounts \_\_\_\_\_ Business Checking \_\_\_\_\_ Account # \_\_\_\_\_ Payroll Acct.# \_\_\_\_\_  
 Credit Type and Amount of Credit \_\_\_\_\_

#### VII. TRADE REFERENCES (Provide three references)

TRADE REFERENCE #1 [credit greater than \$5,000]	TRADE REFERENCE #2 [credit greater than \$5,000]	TRADE REFERENCE #3
Name _____	Name _____	Name _____
Address _____	Address _____	Address _____
Contact _____	Contact _____	Contact _____
Phone _____	Phone _____	Phone _____
Signature _____	Signature _____	Signature _____
DOB/SSN/PT/PO/FA/DO _____	DOB/SSN/PT/PO/FA/DO _____	DOB/SSN/PT/PO/FA/DO _____

#### VIII. INSURANCE

Attach copies of general liability and workers' compensation insurance policy summary pages including the following information: your company's name, insurance company name, agent's name and phone number, policy number, coverage limits.

#### IX. BUSINESS QUESTIONS

1. Has the Company or any of its principals ever filed for bankruptcy? Yes \_\_\_\_\_ No \_\_\_\_\_ (If yes, attach a description of who, when and where filed.)
2. Are there currently, or have there been any lawsuits filed against the Company or any of its principals? Yes \_\_\_\_\_ No \_\_\_\_\_ (If yes, attach a description of the lawsuit and the result.)
3. Are there any unresolved complaints filed against the Company or its principals with the State Attorney General, Better Business Bureau or similar entity? Yes \_\_\_\_\_ No \_\_\_\_\_ (If yes, attach a description of complaint(s) and results.)

#### X. CONTACT

Name of person to contact for additional information: \_\_\_\_\_  
 Phone Number \_\_\_\_\_ E-mail Address: \_\_\_\_\_

#### XI. AUTHORIZATION:

By completing and signing this application I am certifying the accuracy of the information contained herein and have such authority on behalf of the entity named in this application. I further authorize EnerBank USA to verify my Company's credit and other references contained herein and to obtain credit reports on Company's principals if required.

By ( ) \_\_\_\_\_ Title \_\_\_\_\_  
 Printed Name of Signer \_\_\_\_\_  
 Date \_\_\_\_\_ Authorized Representative Of \_\_\_\_\_ (Company)

Please complete and submit by mail or fax to:

Electric & Gas Industries Association  
 3000 Watt Avenue, Suite 105  
 Sacramento, CA 95821  
 Fax: (800) 506-9073

Questions? Call (866) 367-3442 ext. 339 or email: jchandler@egia.org

# CONTRACTOR TRAINING

*Give Participating Contractors Simple Tools and They Will Use Them*

## **CONTRACTOR MARKETING TOOLS**

Marketing tools for contractors that back up the program sponsors consumer marketing message.

- **Trade Ally Branded Program Support Materials**
- **Provide Pitch-Book Design Support**
- **Develop Targeted Sales Book Inserts**

## **CONTRACTOR TRAINING TOOLS**

Effective training of both the technical and the sale side of the business.

- **The Technician and The Salesman Are Typically Not The Same Person**

## **COMPREHENSIVE FINANCING TOOLS**

Makes the energy efficient home affordable especially when complimented with program sponsor incentives.

- **Home Energy Efficiency Doesn't Occur Until It's Financed**



**The Relationship Between The Contractor and The Homeowner Looking Across The Kitchen Table, Is Where “The Rubber Meets The Road”**

# CONTRACTOR TRAINING

## Teach Them How To Sell High-Efficiency Solutions

### Proposal Writing Checklist

Items to include with your bid

#### Cost Analysis:

- Include and educate about annual energy savings and life cycle costs.
- Provide a payback analysis including rebates and tax credits.
- Encourage customers to select the highest efficiency unit they can afford.

#### Evaluating Bids:

- Explain that it is important not be tempted by the lowest bid. The lowest bid often has the lowest value to the customer—a quality contractor takes time to do the job right.

#### Load Calculations:

- Provide customers with a summary of load calculations. These can be useful in comparing bids from other contractors.
- Stress that your calculations are based on current Air Conditioning Contractors of America (ACCA) methods.
- Encourage them to ask questions if they don't understand.

#### System Maintenance:

- Explain the value of a service contract and the importance of system maintenance.
- Educate the customer to check filters each month when in use, and change or clean when dirty. The air filter and coil should be located where it's easy to clean.

#### Proper Diagnostics:

- Explain that a good contractor always measures duct leakage and performs air flow measurement to ensure proper operation.

#### ENERGY STAR:

- Explain the ENERGY STAR Program and that installing a qualifying furnace can increase a home's resale value.
- Encourage customers to always look for the ENERGY STAR symbol when shopping for home appliances.
- Offer to test and seal duct work to improve the existing heating system's efficiency.

#### Integrate Green:

- If possible, provide energy savings, emission savings (both annual and lifetime), and bill savings to emphasize efficiency's positive impact on the environment.
- Each therm of natural gas saved = 11.7 fewer lbs. of greenhouse gasses added to the atmosphere.



### Did you know?

Industry studies indicate up to 70% of HVAC systems suffer from improper installation, increasing costs by up to 30%.

Duct leakage can account for a 25% + loss in system efficiency and comfort.

Replacing an old furnace in a typical Illinois home with a 92% efficient model saves 97 therms or 1,135 pounds in greenhouse gas emissions per year!



The ChicagoLand Natural Gas Savings Program is funded by customers of Peoples Gas and North Shore Gas through a line item on the bill called the Extended Efficiency Program. The Program is granted by Peoples Gas, North Shore Gas, the Citizens Utility Board, the City of Chicago Department of Environment, the Environmental Law and Policy Center and the Illinois Attorney General's Office.

## Developing a Payback Analysis for High-Efficiency Heating Systems

STEP 1

### Determine the amount the customer spends on space heating.

#### A) Calculate baseline costs:

- Using the customer's gas bills, total them for June, July, August and September and divide by four to find the average per month non-space heating gas cost.
- Multiply the average by 8 (number of months requiring space heating) to determine the total cost for non-space heating months (January–May, October–December).
- Example:

$$\$49 + \$31 + \$31 + \$25 = \frac{\$137}{4mo.} = \$34.25 \text{ avg/mo.} \times 8 \text{ mo.} = \$274 \text{ yearly non-space heating cost average}$$

#### B) Calculate space heating costs:

- Using the customer's gas bills, total them for January, February, March, April, May, October, November, and December (space heating months).
- Subtract the total from Part A above to calculate the yearly space heating cost.
- Example, if the bills for January - May and October - December were the following:

$$\$270 + \$258 + \$228 + \$139 + \$90 + \$44 + \$86 + \$240 = \$1,355 \text{ (space heating months)} - \$274 \text{ (non-space heating months average)} = \$1,081 \text{ yearly space heating cost}$$

STEP 2

### Determine the yearly savings as a result of upgrading to a high-efficiency system.

#### A) Calculate total savings for upgrading the existing unit to the new unit.

#### B) Example (assumes an existing furnace efficiency level of 65% and replacement unit level of 92%):

$$\$1,081 \text{ (yearly savings)} \times [1 - \frac{0.65}{0.92}] = \$1,081 \times 0.294 = \$317 \text{ savings per year}$$

STEP 3

### Determine the payback time.

#### A) Using the same assumptions from above, the cost of upgrading from a standard efficiency unit to a high-efficiency 92% AFUE replacement unit (also known as incremental cost) = \$754.

#### B) Calculate the incremental cost payback time:

$$\frac{\$754 \text{ (incremental cost)}}{\$317 \text{ (savings per year)}} = 2.37 \text{ years}$$

#### C) Calculate 20 year savings (based on expected useful life of furnace):

$$\$317 \text{ (savings per year)} \times 20 \text{ years} = \$6,340 \text{ lifetime savings}$$

### Economic Stimulus Package Bonus!

Significantly increased tax credits for home heating and cooling equipment are now available through the American Recovery and Reinvestment Act of 2009. Be sure to include these credits in your calculations and educate customers about this great opportunity for substantially higher savings!

For more information on these tax credits visit ENERGY STAR's website at: [www.energystar.gov/taxcredits](http://www.energystar.gov/taxcredits)



The ChicagoLand Natural Gas Savings Program is funded by customers of Peoples Gas and North Shore Gas through a line item on the bill called the Extended Efficiency Program. The Program is granted by Peoples Gas, North Shore Gas, the Citizens Utility Board, the City of Chicago Department of Environment, the Environmental Law and Policy Center and the Illinois Attorney General's Office.

# CONTRACTOR TRAINING

*Continuing Education With 24/7 Access To Program Training Materials Is Key*



The Chicagoland Natural Gas Savings Program is pleased to present:

## The High Efficiency Training Series for Heating Contractors

### TRACK 1

#### Efficiency Pays: How to Successfully Sell High Efficiency Heating Systems

Presented by renowned building science expert, Steve Easley (and former host of the TV show "This Old House"), this half-day course will explore how to create a profitable business model by promoting high efficiency heating equipment and quality installation practices. Participants will learn:

- General keys to selling – do's and don'ts
- How to utilize green trends to improve business
- How to develop a company value proposition
- Communication strategies to overcome lowest bid situations with high efficiency
- How to leverage the Chicagoland Natural Gas Savings Program to increase sales

**Target Audience:** Heating Contractors – Owners, Sales Staff

Participants may select one of two training dates:

- Wednesday, February 25th
- Thursday, February 26th

**Registration begins:** 8:30am

**Training:** 9am – noon (followed by lunch, provided at no cost to participants)

### TRACK 2

#### Outside the Box: Quality Installation and Maintenance for Heating Systems

Presented by Midwest HVAC expert, Bob Brice of Energy Stewards International, this half-day workshop will focus on maximizing the efficiency of the entire heating system – beyond just the unit – through the technical elements of quality installation and maintenance practices. Participants will learn:

- Common installation issues impacting system performance
- Pressure measurement and diagnostics
- Equipment performance versus system performance
- How to perform a quality installation
- How to leverage the Chicagoland Natural Gas Savings Program to increase sales

**Target Audience:** Heating Technicians

Participants may select one of two training dates:

- Wednesday, February 25th
- Thursday, February 26th

**Registration begins:** 12:30pm

**Training:** 1pm – 4pm (preceded by lunch, provided at no cost to participants)

## Administer An Ongoing Training Curriculum

- Workshops
- Webinars
- Online Learning

## Establish A “Contractor Corner” Informational Section On Your Website

- Repository For All Program Materials, Marketing Collateral, Training Materials, Sales Tools & Announcements
- Password Protected So That You Know Who Is Accessing Program Materials

# PERFORMANCE MONITORING AND QUALITY ASSURANCE

*Ensure The Program's Reputation For Quality And Value*

## **ENSURES PROGRAM QUALITY**

- Participating Contractors are Properly Qualified
- Installed Measures Meet Program Requirements

## **REPORTING PROCESS**

- Ensure Jobs Promoted Under The Program Are Reported  
(Metrics for Regulators or Shareholders/Members)
- In-office File Review
- On-Site Inspections

## **CUSTOMER SATISFACTION**

- Customer feedback mechanism
- Conflict resolution mechanism

# PERFORMANCE MONITORING & QUALITY ASSURANCE

## In-Office File Review

- Assessment Report (existing conditions to verify actual vs. deemed savings)
- Findings and Recommendations
- Scope of Work
- Final Inspection Report
- Completion Report
  - Certificate of Completion
  - Rebate Request...

## On-Site Inspection

- Job Selection Protocol Tiered on Contractor Performance Record
- Customer Discussion
- Inspection Documentation
- Visual Inspection and Diagnostic Tests

# CUSTOMER SATISFACTION

## CUSTOMER FEEDBACK

- Determine customer satisfaction
- Check for program compliance
- Identify high-performing and low-performing contractors
- Focus marketing efforts
- Contractor follow-up (negative and positive)
- “Scorecard” to encourage work...
- Leads back to referrals

## CONFLICT RESOLUTION

- Determine if deficiencies exist (on-site inspection)
- Is there a health and safety condition requiring immediate corrective action?
- Document corrective actions, discuss with contractor, determine if additional training is required
- Re-inspect
- Determine contractor’s potential for continued participation

### CONTRACTOR/VENDOR LIST - page 1 of 2

The following contractors or vendors (listed alphabetically) have demonstrated their interest and ability in helping businesses complete energy-efficient lighting retrofits and apply for funding from LIGHTENUP.

Platte River Power Authority’s LIGHTENUP provides cash incentives for energy-saving lighting retrofits. An application must be submitted to Platte River and approved *before* the retrofit is begun. The program is open to all commercial electricity customers of Estes Park Light & Power (Town of Estes Park), Fort Collins Utilities (City of Fort Collins), Longmont Power & Communications (City of Longmont), and Loveland Water and Power (City of Loveland).

**Customers may work with any vendor or contractor and are not limited to those on this list.** This list is simply intended as a starting point for customers without a prior relationship with a vendor or contractor. Customers are encouraged to solicit bids from two or more companies.



Contractor/Vendor	Contact Person	# of Projects Completed	Avg. Customer Star Rating (4 stars possible)
<b>Accurate/Dickinson Lighting &amp; Electric</b> 1504 Wagon Tongue Dr. Fort Collins, CO 80521	<b>Chris Stein</b> cstein@accurateinc.biz (970) 482-9226	4	★★★★ 3.9
<b>Advanced Lighting &amp; Energy Solutions</b> 5130 Parfet St. Wheat Ridge, CO 80033 www.Advanced-e.com	<b>Ted McGee</b> tmcgee@Advanced-e.com (303) 940-5900	2	★★★★ 4.0
<b>Chadwick Electric Services</b> 1305 Duff Dr. #6 Fort Collins, CO 80524	<b>Don Beranek</b> don@chadwickelectric.com (970) 482-9449	3	★★★★ 4.0
<b>Circle C Electric LLC</b>	<b>Terry Graves</b>		

# WYOMING GEOSmart LOAN CONTRACTOR REFERRAL

## Sponsored By The Wyoming Home Performance Alliance



Energy Center

Finding The Right Contractor

Approved Contractor

EGIA Financing

Contractor Referral



Contractor Referral

### ATTENTION Wyoming HOMEOWNERS Find EGIA APPROVED Contractors In Your Area

To be referred to an EGIA Approved Contractor in your area, please fill out the information below. EGIA will refer you to EGIA Approved Contractors serving your area to answer any questions you may have regarding their services and for your energy efficient home improvement. All contractors participating in this referral program are also approved for EGIA Smart financing to help make your efficient home improvement project more affordable.

Should you require additional contractors, please call EGIA toll-free at 888-367-3442. The EGIA Contractor Referral Program is currently expanding across the country. *If contractor referrals are not currently available in your area, please check back by adding new states to our program on a regular basis.*

First Name:

Last Name:

Address:

City:

State:

Zip Code:

Phone:

Email Address:

I'm looking for a qualified contractor for the following (check all that apply)

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Air Conditioning        | <input type="checkbox"/> Windows          | <input type="checkbox"/> Roofing             |
| <input type="checkbox"/> Heating                 | <input type="checkbox"/> Doors            | <input type="checkbox"/> Siding              |
| <input type="checkbox"/> Solar Photovoltaic (PV) | <input type="checkbox"/> Hot Water Heater | <input type="checkbox"/> Other               |
| <input type="checkbox"/> Solar Water Heating     | <input type="checkbox"/> Insulation       | <input type="checkbox"/> Solar Space Heating |
| <input type="checkbox"/> Solar Pool Heating      | <input type="checkbox"/> Plumbing         | <input type="checkbox"/> Wind Power          |

Submit Contractor Referral Request



Energy Center

Finding The Right Contractor

Approved Contractor

EGIA Financing

Contractor Referral



Contractor Referral

### ATTENTION Wyoming HOMEOWNERS Find EGIA APPROVED Contractors In Your Area

The following contractors are EGIA Approved and are qualified to perform your energy efficient home improvement project. The EGIA Approved Contractor Program was developed to identify the premier companies within the home improvement industry and to provide homeowners with a powerful tool while searching for a contractor. To attain the EGIA Approved Contractor status, contractors must satisfactorily pass a screening and review process and be approved to offer homeowners EGIA GEOSmart low interest financing.



If you do not see contractors listed for each of the services you selected on the previous screen, please check back in the future as we continue to grow our Approved Contractor network.

Service	Contractor	Phone
HVAC	AdamsCraft, Inc.	(307) 721-7025
HVAC	Advanced Air Systems, Inc.	(307) 778-4911

For your convenience, we've asked the contractors listed above to contact you within the next two business days to answer any questions you may have regarding their services and to schedule a free estimate for your energy efficient home improvement.

We invite you to explore the EGIA Energy Center to find the latest home energy savings tips and to help you identify and prioritize energy efficient home improvement projects that can reduce your energy bill, increase home comfort and positively impact the environment.

Also for "Do It Yourself" home improvement, check out the Energy Store for an extensive selection of low cost energy efficiency products.

# WYOMING GEOSmart LOAN PROGRAM

## Contractor Marketing and Sign-up Process



### Wyoming GEOSmart Loan Program

The Wyoming Energy Council and Wyoming Home Performance Alliance have teamed with the Electric & Gas Industries Association (EGIA) to deliver the Wyoming GEOSmart Loan Program. Wyoming home improvement contractors now have access to the nation's leading home efficiency financing program, designed to increase your sales and make energy-efficient home improvement applications affordable for your customers.

#### Program Features

- 100% Project Financing
- No Customer Loan Fees/No Liens
- 7.99% - 8.99% APR Fixed Rate For Life Options
- 6-12 Month No Payments/No Interest Promotions
- Loan Amounts Up To \$25,000
- New, Lower Payment Factors Make Customer Payments Affordable
- Instant In-Home Approvals: Quick & Easy Paperwork
- Branched GEOSmart Credit Applications
- Direct Deposit Funding To Contractors Upon Job Completion
- Industry High Approval Rates
- Participating Contractors Included in Customer Referral Program & Direct Access To Free Customer Leads

To get started and be prepared to offer your customers the Wyoming GEOSmart Loan Program, click on the "Request GEOSmart Sign-Up Kit" link below or contact LISA Credy for more information at (866) 367-3442 ext.1394

[Request GEOSmart Sign-Up Kit](#)



### Wyoming GEOSmart Loan Program

#### Request A GEOSmart Financing Sign-up Package

Please fill in the application below and click the Submit button when finished. EGIA will send you a sign-up package within 7 business days.

**Company Name:**   
**Contact Name:**   
**Address:**   
**Unit:**   
**City:**   
**State:**   
**Zip Code:**   
**Phone:**   
**Fax:**   
**Email Address:**

To participate in the Wyoming GEOSmart Loan Program, Contractors Must:

- Be certified to perform at least one of the renewable energy measures covered under the program
- Complete the GEOSmart sign-up kit and be approved by GE Money for program participation.

[Click Here For Sign-Up Package](#)

[www.egia.org/WyomingHP](http://www.egia.org/WyomingHP)

# CONTACT INFORMATION



**ELECTRIC & GAS INDUSTRIES ASSOCIATION**

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