

THE RIGHT PARTNER FOR INDIANA

The right solution provider empowers the Indiana Office of Energy Development (IOED) to achieve its goals and mitigate risks. The BLN Team provides the IOED with the **seven essential traits required for the energy rebate program to be successful**.

1. Exceptional Federal Program Expertise

The BLN Team, **headquartered in Indiana**, provides the IOED with industry-leading expertise in all facets of federal fund management. Our team of professionals has administered over \$40 billion in federally funded programs in recent years. These programs include, but are not limited to, **Indiana Homeowner's Assistance Fund (HAF), Indiana & Georgia Emergency Rental Assistance Programs**, and multiple Community Development Block Grant (CDBG) & Federal Emergency Management Agency (FEMA) housing repair and reconstruction programs. This experience positions us to accelerate program design while grounding Indiana's program in compliance with all federal and United States (U.S.) Department of Energy (DOE) requirements.

2. National Expertise in the Design & Implementation of Energy Rebate Programs

The BLN Team has over 50 years of experience with energy rebate programs. Our team has designed, developed, and implemented over 750 energy rebate programs across the U.S. This experience, coupled with our extensive experience managing federally funded programs, best positions us to design and implement a successful program for Indiana. We are committed to working with the IOED to provide energy-saving opportunities and improve Indiana residents' health, safety, and comfort.



Administered
over 750 Energy
Rebate Programs



Delivered
over \$4 Billion in
Energy Incentives



Over \$320 Million
in Electric
& Gas Savings

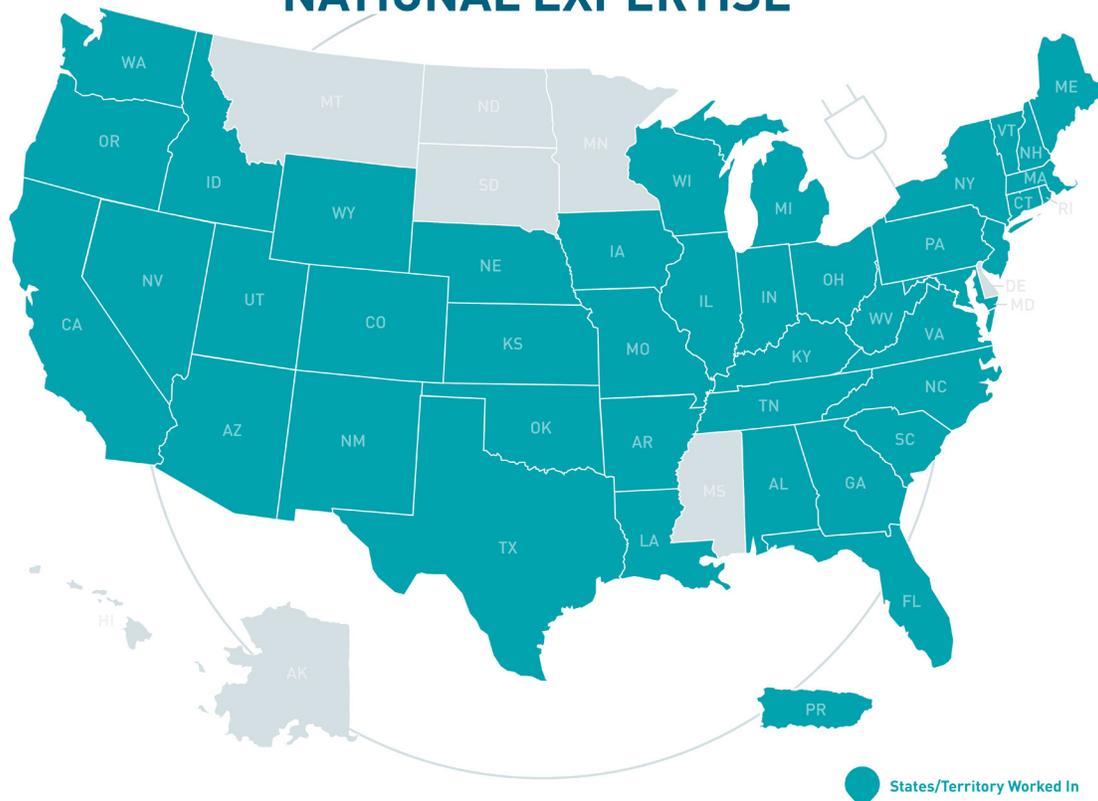


Created
More Than
20,000 Jobs



Over
1 Million
Households Served

NATIONAL EXPERTISE



3. Unparalleled Experience in Indiana

The BLN Team provides the IOED with extensive federally funded and energy rebate program experience across the Hoosier state. We have designed, implemented, and evaluated **Duke Energy** and **Centerpoint Energy** programs for nearly 15 years. This experience uniquely positions our team to assist the IOED in identifying high-performing contractors, potential partnerships with existing programs, an understanding of communities with the highest energy burden, and proven marketing strategies embraced by Indiana households. Additionally, we have served numerous times as a trusted partner on some of Indiana's most complex individual assistance programs. Most recently, our work for the **Indiana Housing & Community Development Authority (IHCDA)**, which provided turnkey program management services on their HAF program, was recognized by the U.S. Department of Treasury for best practices and now serves as the model program for the U.S. This program, delivered two years ahead of schedule, required many of the same scope items as will be required by these energy rebate programs.



4. National Leader & Unmatched Capacity in Program Design & Delivery

Our project leadership team provides the IOED industry-leading expertise in energy rebate programs, federal fund program management, compliance, reporting, workforce development, and stakeholder outreach. Supporting our project leadership is an expansive network of industry veterans, providing Indiana with exceptional capacity to meet the demands of its rebate programs. Through our experience with over 3,500 client assignments, our team understands the entire life cycle of energy rebate programs - from planning and design to implementation and evaluation.

5. Stakeholder Outreach & Engagement

The BLN Team provides unmatched experience designing and implementing stakeholder outreach and marketing plans across Indiana. Our team has successfully partnered with numerous Indiana state agencies to develop and implement comprehensive stakeholder engagement and marketing plans. Most recently, we provided comprehensive marketing and outreach plans for **IHCDA** on their statewide HAF program. Our approach to stakeholder outreach, community benefits planning, and marketing these rebate programs is grounded in DOE compliance and unmatched relationships with key program partners, utility companies, community groups, and media entities across the Hoosier state.

6. Proven, Tested IT Solution That Works Today

The BLN Team provides a comprehensive and customizable IT solution successfully deployed on over 750 energy rebate programs nationwide. iEnergy™, our end-to-end energy program management platform, offers a centralized data repository to securely collect, store, track, and report on the participant, funding, and program data while reducing state administrative and implementation costs.

- A Utility-integrated Platform
- Online/Offline Available Cloud-based Tool
- SOC2/Type II to Protect Personally Identifiable Information (PII)
- Categorical Eligibility-Ready Secure Online Portal
- Contractor Connectivity
- DOE/PNNL Compliant Solution
- Comprehensive Data Analytics & Reporting
- Streamline Contractor Payment Processing
- Streamline Federal Reporting
- Participant User Experience (PUX)
 - Users Can Apply & Track Application Status

7. Extensive Experience with Multiple Energy Rebate Delivery Models

As national leaders in designing and delivering energy rebate programs, we have extensive experience and operate programs utilizing each commonly used delivery method. As we evaluated all the delivery model options through the lens of application in a statewide, federally funded program, we recommend the Closed Contractor Network model to ensure federal reporting compliance, mitigate the risk of fraud, maximize contracting opportunities for Indiana businesses, facilitate workforce development for the un/under-employed, and best position Indiana to achieve Justice 40 (J40) requirements.

■ *Our team provides Indiana with expertise in energy rebate programs, federal fund program management, compliance and reporting, workforce development, and stakeholder outreach.*

THE BLN SOLUTION

A *cost-effective, compliant, & efficient* solution for Indiana's energy rebate programs.

ACCELERATED PROGRAM DESIGN & APPLICATION PHASE

The BLN Team provides the IOED with an extensive understanding of all required facets of program applications and implementation blueprints. The DOE requires six plans in the Inflation Reduction Act (IRA) energy program funding application. Based on our knowledge and experience designing and delivering these programs – we will complete the DOE-required plans within 180 days of notice to proceed. We have proactively begun drafting Indiana's submission ahead of the award to help accelerate program launch based on our experience delivering programs in Indiana. However, it is imperative to note there are other standard operating procedures (SOPs) and components we strongly encourage the IOED to incorporate into its planning phase. These additional deliverables are necessary to operationalize these complex programs fully.

We will concurrently submit the IOED-approved application and Implementation Blueprint (DOE-required plans) to accelerate the program launch.

DOE Required Plans	Additional SOPs to Streamline Startup Program Operations & Delivery	
<ol style="list-style-type: none"> 1. Utility Data Access Plan 2. Education & Outreach Strategy 3. Consumer Protection Plan 4. Market Transformation Plan 5. Community Benefits Plan 6. Privacy & Security Risk Assessment 	<ul style="list-style-type: none"> • Workforce Development Maximization • Health & Safety SOPs • Utility Program Collaboration & Coordination Plan • Customer Service Plan • Impact Plan: Stacking & Braiding Funds • State of Indiana: Inter-agency Coordination Plan 	<ul style="list-style-type: none"> • Installation & Equipment Specification Guide • Delivery Model Plan • Modeled vs. Measured Savings Plan • Evaluation, Measurement & Verification (EM&V) Plan • Supply Chain & Procurement Guide

INDIANA'S IMPLEMENTATION BLUEPRINT

The BLN Team's approach to planning is grounded in industry best practices, compliance, and innovation.

COMMUNITY BENEFITS PLAN: Duration - 90 Days



Objective/Purpose of Plan

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

Experience with Community Benefits Plan Development

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

Technical Approach to Plan Development

To begin the planning process, we will assemble a working group of local thought leaders, our policy specialists, utility stakeholders, and key state and local government members. This cadre will work collaboratively to identify underserved/underemployed populations across Indiana who would benefit the most from program offerings. Once this exercise is complete, the working group will engage in public comment sessions and town halls to solicit feedback from potential applicants, contractors, distributors, and other program partners. Focusing on transparency and full inclusion, the working group will publicly post its findings, plans, and intentions to drive community buy-in.

Engage Community & Labor

The BLN Team is well-positioned to drive diversity, equity, inclusion, and accessibility through initial community engagement, thoughtful program design, and creative contracting strategies. Our Community Benefits Plan is founded on engagement with Hoosier households, community groups, local government units, contractors, and existing labor groups. We will conduct town halls and listening sessions and send local units of government fact sheets and surveys that provide information regarding the program while soliciting input on their abilities to participate. The BLN Team will use this collaboration to educate cities and towns, gain buy-in, and identify in-need communities statewide.

We will engage local labor unions to identify their current labor gaps, training strategies, interest in program participation, and early identification of qualified prime and subcontractors. Below is a list of potential unions we will look to collaborate with:

- Laborers International Union of North America (all Indiana Chapters)
- Indiana State Building & Construction Trades Council & Regional Chapters
- Indiana State AFL-CIO (& Area Labor Federations)
- The Mechanical Contractors Association of Indiana
- Plumbers, Steamfitters & HVACR Service Technicians Union (Indiana Locals)
- Indiana Builders Association

Engage & Support a Skilled & Qualified Workforce

The BLN Team provides exceptional experience and methods for facilitating workforce development and employment engagement through energy rebate programs. Our thoughtful program design and tactics have created over 10,000 jobs nationwide. We have proactively identified numerous stakeholders we could incorporate into developing these strategies. They include, but are not limited to:

- Indiana Department of Workforce Development (DWD)
- Ivy Tech Community Colleges
- Martin University
- Governor Eric Holcomb's Workforce Cabinet
- High School & Community-based Vocational & Technical Programs
- Next Level Jobs
- WorkOne & Local Career Centers

A Multitude of Job Opportunities

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

- Electricians
- HVAC Technicians
- Insulation Workers
- BPI Energy Auditors
- Building Analyst Technicians
- Building Analyst Professionals
- BPI Building Science Principles
- HERS Raters

Expanding Energy Auditor Capacity

Indiana has less than 10% of the energy auditors necessary to deploy these programs. The BLN Team is well-versed in upskilling and certifying energy auditors. We thoughtfully partner with community action agencies (CAAs), career and vocational training schools, and community colleges daily to facilitate the necessary capacity to execute energy rebate programs. We have proactively identified several entities and institutions throughout Indiana, including **The Indiana Training Institute** and each of Indiana's 27 CAAs.

Engaging the Contracting Community: Our goal for contractor outreach is to identify a network of qualified, competent, capable contractors interested in participating. The BLN Team provides the IOED with an extensive network of relationships with trade associations, labor unions, various utilities, and other skill-based organizations throughout Indiana's 92 counties, whose members are potential contracting partners for the program. Those include, but are not limited to, the **Indiana State Building & Construction Trades Council**, which consists of 127 affiliated unions and over 75,000 trained professionals, the **Associated General Contractors of Indiana**, **Build Indiana Council**, **Indiana Builders Association**, and **Indiana Construction Roundtable**.

Promote Statewide Diversity, Equity, Inclusion & Accessibility (DEIA) & J40

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

Leveraging Section 50123, we will engage local vocational, technical, and community colleges to implement training programs that bolster the local workforce, remove barriers to program participation, and create legacy jobs within Indiana. **The BLN Team is currently finalizing a partnership with Martin University, Indiana's only historically black college/university, to provide internships and job opportunities for their student population through these energy rebate programs.** The BLN Team has a comprehensive training curriculum to educate and certify energy auditors and other specialized tradespeople required for program success. To ensure program success and condense the overall schedule of the rebate program, we will implement these training strategies alongside program planning. This accelerated schedule ensures that residences can be assessed as soon as possible.

Engage DOE & State Energy Offices to Understand How They are Implementing Their Programs

We will engage stakeholders who have implemented similar programs in other states to gather information about how they implemented their programs and build upon their best practices and lessons learned to ensure the IOED delivers a comprehensive and successful program to Indiana's residents.

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

DEIA & J40 for Job Opportunities: Our team’s outreach messaging includes opportunities to apply for assistance and receive job training and job placement opportunities afforded by the program. The BLN Team possesses refined training curricula that can be used by and alongside technical schools and community colleges to upskill existing laborers and thoroughly train inexperienced candidates. The BLN Team will lean into established relationships with **DWD** and **Ivy Tech Community College** to ensure statewide reach is facilitated for this vital part of our solution.

DEIA & J40 for Contractors: Through collaboration with the utilities, the BLN Team will identify existing high-performing XBE installation contractors in the state. Our team is committed to fostering partnerships between large construction managers and smaller existing contractors to ensure hindrances to program participation are removed. The BLN Team will also work with the **Indiana Construction Roundtable**, whose members comprise various representatives from all design and construction industry facets.

DEIA & J40 for Community Partners: The BLN Team will increase access and trust in the program through collaborative partnerships with CAAs and other pillars within local communities, as outlined above and in our Education & Outreach section below.

Contractor Outreach: Contractor outreach identifies and activates a statewide network of qualified, competent, and capable contractors interested in participating in the program application.

Comprehensive Approach to Contractor Identification & Engagement: The BLN Team provides the IOED with an extensive network of relationships with trade associations, labor unions, various utilities, and other skill-based organizations throughout Indiana’s 92 counties and whose members are potential contracting partners for the program.

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

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

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

INNOVATION

The BLN Advantage — Innovation & Risk Mitigation

- A Multifaceted Approach that Ensures J40 Compliance
- Establishes Curriculum to Partner with Education Institutions in Historically Disadvantaged Communities
- Mentor-Protege Program to Foster the Growth & Development of XBE Contractors
- Longstanding & Extensive Network of Valuable Market Partner & Stakeholder Relationships Across Indiana

EDUCATION & OUTREACH STRATEGY: Duration - 60 Days



Objective/Purpose of Plan

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

- Description of Planned Activities for Household Outreach (Channels & Partnerships)
- Timeline for Execution of Outreach Activities
- Estimated Outreach & Education Budget

We will provide outreach beyond the minimum requirements that include but are not limited to, workforce development, training and certification program development, extensive partnerships with local and trusted entities, branding packages, J40 community identification, and outreach.

Experience with Education & Outreach

We provide unparalleled experience designing and implementing multifaceted communication and outreach strategies among the hundreds of energy rebate and individual assistance programs administered nationally and in Indiana. Examples of previous outreach campaigns include but are not limited to:

Extensive Indiana & National Marketing Experience

- >750 Energy Rebate & Reduction Programs Across the U.S.
- CDBG - Disaster Recovery (CDBG-DR)
- Various FEMA Programs
- CDBG - CARES Act (CDBG-CV)
- Small Business Grant Programs
- **Indiana COVID-19 HAF**
- COVID-19 Vaccination Program
- U.S. Census Participation

Technical Approach to Plan Development

Education & Outreach to Households

Education and outreach informs residents about the program's benefits, encourage participation, and capture application submissions. We will implement an integrated marketing and communication plan.

1. Developing a Brand for the Indiana Energy Rebate Program: We will conduct a learning session with the critical leads at the IOED that will allow us to reach a consensus on goals, objectives, strategies, tactics, key performance indicators, and success metrics.

2. Campaign Messaging & Design: To drive targeted acquisition, we will draw on our experienced, Indiana-based, creative team to develop an innovative and recognizable campaign identity that resonates with the target audiences. An audience-centric message framework capturing key messages, messengers, and channels that are compelling for each audience and campaign identity concepts that will be refined to a single creative narrative is included in this phase. Implementation would consist of creative video, voice, and social ad content.

Campaign Execution

Public Relations (PR): PR will include earned media by enlisting print and broadcast reporters to help explain the program and the need for eligible Hoosiers to participate in the opportunity. This establishes a partner coalition to serve as third-party advocates that validate the program and a coordinated grassroots community relations team that will appear at events throughout Indiana to engage, particularly, J40 audiences.

Maximize Awareness & Participation Through Categorical Eligibility

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

Thoughtful Outreach Plan Development



Income-Qualified & Underserved Communities: Our development process begins with research to understand market needs and where program resources are needed most. Our plan prioritizes income-qualified and underserved communities. Our team's work within these communities has taught us that we can offer health and safety measures beyond energy-saving opportunities to improve indoor air quality and combustion safety, avoid mold infestations, and detect carbon monoxide. While we would not exclude residents who do not meet income qualifications, our recommendation would be to prioritize funds and services to residents who need them most based on income needs, age, health issues, and other qualifying factors we can work with the IOED to define.

Geographic Targets: We recommend layering geographic priorities to focus resources/funds. Public resources, like ArcGIS Living Atlas of the World, have incorporated census tract data to identify low-income communities nationwide.

Public Housing Authorities (PHA): We bring experience working with PHAs and low-income property managers. Leveraging relationships and other public resources, we will work with the IOED to establish a plan to get resources to residents who need them most.

Community-Based Coordination: Our plan for the IOED's disadvantaged communities will leverage trusted community leaders - like Indiana's 27 CAAs, partner with local organizations and faith-based institutions, and conduct outreach events in diverse neighborhoods to build trust, address concerns, and maximize participation.

Utilities: We will leverage existing relationships, industry best practices, and proven marketing tactics to partner with utilities, municipalities, and cooperatives to maximize awareness and drive program participation. Examples of this outreach and marketing include utility bill inserts, advertising on utility websites, and leveraging the limited number of rebate programs currently operational in Indiana. This collaboration will consist of representatives from **AEP, Duke Energy, NIPSCO, Centerpoint**, and the **Indiana Energy Association**, comprising 14 member entities serving more than two million Hoosiers.

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

The BLN Advantage — Innovation, Risk Mitigation & Cost Savings

INNOVATION

- Leverages Previous Energy Rebate & Federally Funded Program Administration Practices & Tactics
- Maximizes Low-cost, High-impact Strategies to Reduce Administrative Burden & Increase Benefit Funding
- Ability to Control Applicant Pipeline & Contractor Workflow without Overspending/committing
- Proven Tactic to Engage J40 Communities
- Engages Strategic Partners to Cost-effectively Market the Program

CONSUMER PROTECTION PLAN: Duration - 120 Days



Objective/Purpose of Plan

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

- Mechanism to Solicit Consumer Feedback
- Resolution Procedures
- Data Review for Completed Projects
- On-site Inspection Standard Procedures & Documentation
- Contractor Eligibility & Pre-qualification Requirements
- Installation Quality Assurance & Closeout
- Processes & Mechanisms for Continuous Process Improvement

Experience with Consumer Protection Planning

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

Technical Approach to Plan Development

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

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

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

Resolution Procedures: Not only will the BLN Team draft and enforce written resolution procedures, but we possess several differentiators that reduce conflict:

- Our contract engagement strategy & program delivery model drastically reduce the likelihood of conflicts between contractors & applicants
- Our closed contractor network vets & prequalifies contractors with the appropriate licensing, insurance, certifications, customer service & performance backgrounds. To maintain control over the applicant experience, we strongly discourage using aggregators
- Our thoughtful workforce development systems ensure energy auditors possess certifications in BPI standards & customer service training
- To drive transparency & participation, we will perform initial energy audits with the presence of the applicant, our energy auditor & contractor's representatives

- The installation of complex systems & those within walls will be observed during construction

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

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

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

Our federal procurement specialists will work collaboratively with the IOED staff to develop standard terms and conditions, progress clauses, and liquidated damages that conform to the federal guidelines outlined in the ALRD and build upon lessons learned from previous programs similar in scope. We will engage in extensive outreach to maximize contractor awareness and interest during the Program Design Phase. Simultaneously, we will engage contractors who meet our criteria for a designated period while collaborating with Indiana to develop policies and procedures, facilitating the inclusion of additional contractors throughout the program.

Contractor Performance Monitoring: We provide Indiana with direct contractor supervision and mandatory monthly contractor meetings to discuss work performed, any quality control issues that may arise, and develop performance improvement plans if necessary. This approach significantly decreases the likelihood of a contractor being delisted while maintaining the highest project delivery standards.

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

Continuous Improvement: The BLN Team will implement procedures to facilitate continuous programmatic improvement throughout the program. Outlined below are the facets of our business process and the fashion in which we monitor each to drive improvement:



MARKETING

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



CALL CENTER

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



CASE MANAGEMENT

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



ENERGY AUDITORS

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



CONTRACTORS

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



FINANCIAL CONTROLS

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



CUSTOMER FEEDBACK SURVEYS

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

The BLN Advantage — Risk Mitigation & Reduces Costs

INNOVATION

- Decreases Change Orders
- Reduces Administrative Expenses Through the Closed Contractor Network
- Contractor Task Orders are Created by the BLN Team, Not by Installation Contractors
- Our Strategy Guarantees Control, Monitoring & Process Improvement for all Facets of the Program
- Enhances Contractor Oversight & Increases Transparency

UTILITY DATA ACCESS PLAN: Duration - 45 Days



Objective/Purpose of Plan

This plan is grounded in risk mitigation, ensuring any PII is maintained safely and securely, and appropriate data protection protocols are established, monitored, and adhered to.

Experience with Utility Data Access

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

Technical Approach to Plan Development

Our approach is grounded in federal compliance and the requirements outlined in the Utility Data Access Guidelines issued by the DOE.

Key Components of the Utility Data Access Plan

- Definition of Energy Consumption Data to be Collected & Purpose for Collection
- Consumer Consent Processes
- Data Field Requirements
- Timing of Data Exchanges
- SFTP Data Exchange Processes
- Data Access Limits & Restrictions
- Physical & Electronic Document Storage Processes & Requirements
- Data Backup Processes

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

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

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

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

The BLN Advantage — Reduces Risk, Saves Time & Money

INNOVATION

- Our SOC2 Type II Systems, Processes & Procedures, Provide the Highest Standards of Security & Mitigate Risk to Indiana
- Our System Processes & Procedures Comply with DOE Requirements & are Currently Operational with Utilities Nationwide
- Streamlines the Planning & Integration to Accelerate the Operation of These Rebate Programs
- Already Incurred the Costs of Achieving SOC2 Type II Compliance & Will Undergo an Annual Audit to Maintain Security Tools & Processes

PRIVACY & SECURITY RISK ASSESSMENT PLAN: Duration - 90 Days



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

Objective/Purpose of Plan

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

- The Confidentiality, Integrity & Availability of Team Infrastructure & Services from Senior Management
- The Involvement, Cooperation & Insight of All Team Members
- Initiating Risk Assessments, Starting with the Discovery & Identification of Risks
- The Thorough Analysis of Identified Risks
- A Strategy for the Treatment of Identified Risks
- Communicating All Identified Risks to the Company
- Encouraging the Reporting of Risks & Threat Vectors from All BLN Team Members

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

- A Significant & Major Change to Existing Infrastructure, Product, Contract, or Business Practice
- A Significant Amount of Time (e.g., a Year) Has Passed Since the Last Risk Assessment

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

Experience with Privacy & Security Risk Assessment Plans

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

- Setup for Data Replication & Disaster Recovery to Prevent System Disruption
- Role-based Access to iEnergy to Manage Information Access
- System Monitoring & Alert Processes
- Multi-factor Authentication Processes & Requirements
- System Logging & Auditing Features
- Performance of Security & Vulnerability Testing

Technical Approach to Plan Development

This Risk Assessment & Management Program Policy applies to technical processes and practices, organizational communications, financial systems, and data stored, accessed, maintained, or managed on BLN Team-owned or allocated infrastructure.

Risk assessments should evaluate systems under the BLN Team's control. Our risk assessments may also include an analysis of business practices, procedures, and physical office spaces. Vendor risk assessments are covered under our Vendor Management Policy, which consists of a risk assessment targeted at a vendor's security, business practices, legal commitments, and insurance postures. The policy will include the following elements:

- Risk Mitigation Standards
- Risk Owner Assignments
- Risk Assessment Processes

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

The BLN Advantage — Risk Mitigation & Reduces Costs

INNOVATION

- Established Software Platform Used to Capture Participant, Project, Energy Savings, Rebate & Budget Data for Over 100 Utilities Nationwide, Manage Over 750 Energy Programs & Pays over \$1.9 Billion in Energy Rebates
- Undergoes Rigorous, Industry Standard Security Auditing
- Provides Full Program Visibility to IOED & BLN Team Program Leaders
- Highly Configurable to Meet IOED & DOE Needs & Requirements
- Securely Exchanges Utility Data Today

MARKET TRANSFORMATION PLAN: Duration - 90 Days



Objective/Purpose of Plan

Market Transformation (MT) in practice involves:

- Understanding Market Barriers
- Identifying Leverage Points
- Implementing Targeted Strategies
- Measuring Key Market Progress Indicators
- Ensuring the Desired Changes Persist

Our MT plan will describe the strategies, assumptions, and data needed to quantify the MT results. Developing an MT Plan for the DOE's home energy rebates programs will look for additional benefits that will persist over the long term and across Indiana.

Experience with MT Development

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

Technical Approach to Plan Development

Even though the DOE requires an MT plan to be developed one year after receiving funding, the BLN Team encourages the IOED to consider planning and integrating this plan into the design before the program launch. Leveraging our team's experience priming markets for MT and successfully achieving transformation goals, we will work throughout the program implementation period to establish the infrastructure required for the programs to have lasting impacts beyond rebate offers. The DOE has identified one requirement and several goals for the Market Transformation Plan; these include:

- **Plan Requirement - Impacting Home Value**
 - Enabling the market to recognize the value of homes that have been upgraded through the Home Energy Rebates, including at the time of sale/rental
- **Support the Following Goals:**
 - Cost sharing, Braiding & Coordinated Financing of Home Energy Upgrades
 - Utilize Rebate Programs to Enable New Business Models in Partnership with Private Capital to Monetize Grid Benefits
 - Consider New Self-sustaining Business Models for Home Energy

To develop the MT Plan, we will:



Evaluate certification programs, like the DOE Home Energy Score (HES), as tools to measure how energy upgrades funded by the programs impact home values



Investigate how we will leverage other funding sources, like financing, to further break down cost barriers and make qualifying equipment purchases more affordable



Assess the workforce development components that must be integrated into our MT Plan to ensure the program produces a local workforce capable of supporting energy upgrades beyond the program



Connect with utility demand response program team to outline approaches we can integrate into program delivery to maximize long-term grid benefits

Workforce Development

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

- Building program awareness & technical knowledge & bolstering the business & marketing understanding of supply chain partners
- Organizing training in targeted geographic locations across Indiana to expand technical skill sets in high-potential or under-served locations
- Ensuring supplier diversity & inclusive procurement & partnership practices
- Targeting local workforces in under-served & hard-to-reach communities through partnerships with community-based organizations (CBOs)

Grid Benefits

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

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

The BLN Advantage — Risk Mitigation, Cost & Time Savings

- INNOVATION**
- Added Assurance of & Confidence In Success for the State Based on Our Similar Experience with Statewide MT Initiatives
 - Proactive Approach to MT Plan Development to Ensure Integration & Alignment with Program Delivery
 - Existing Templates & Tools for MT Planning & Tracking, Reducing Administrative Expenses
 - Expertise in Understanding Grid Benefits of MT Through the Ability to Leverage the BLN Team’s Grid & Demand Management Teams

INDIANA’S ANTICIPATED PROGRAM ADMINISTRATION TIMELINES:

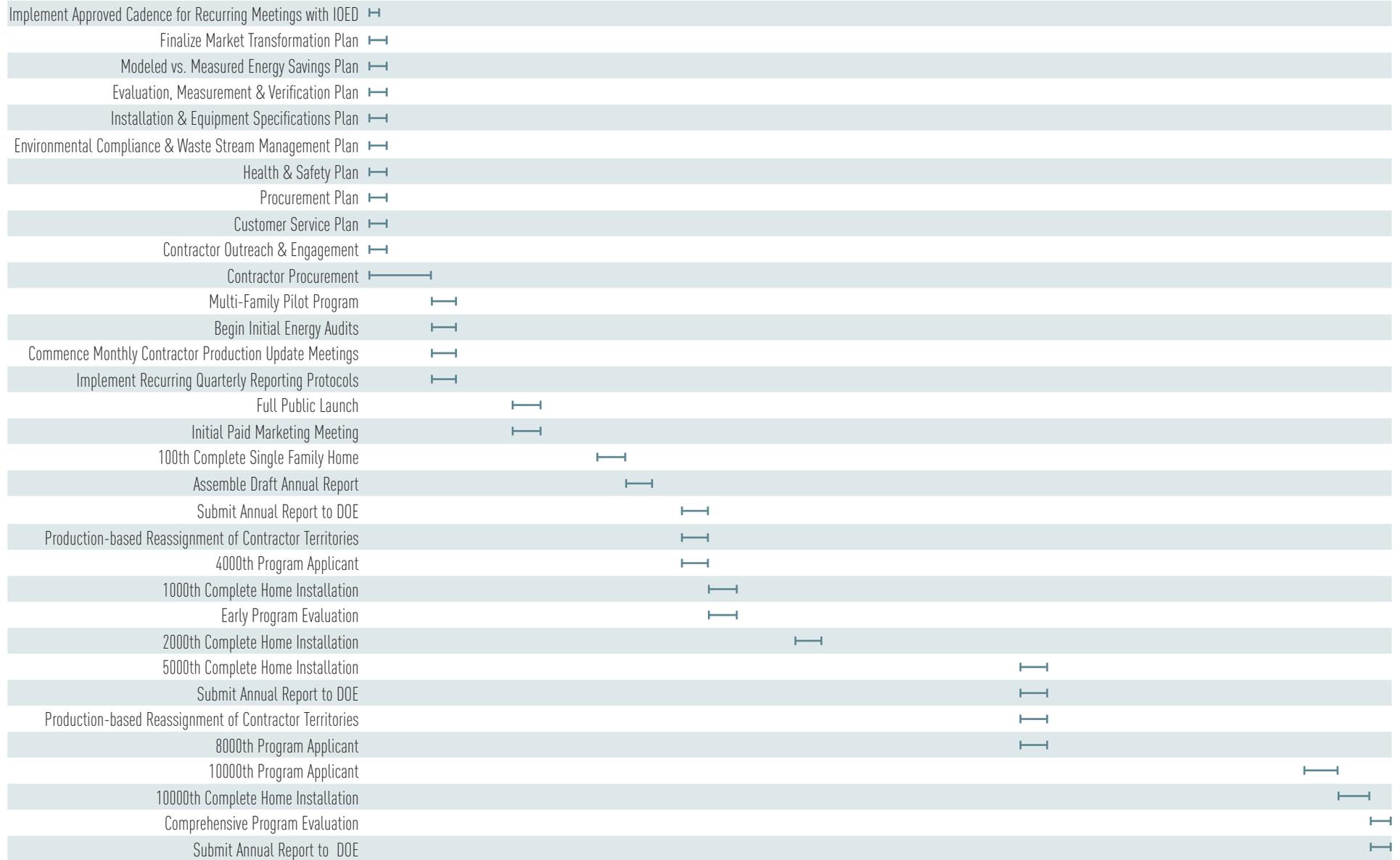
The State Implementation Blueprints must be completed and submitted to DOE 60 days prior to program launch.



Days

0 30 60 90 120 150 180 210 240 270 300 330 360 390 420 450 480 510 540 570 600 630 660 690 720 750 780 810 840 870 900 930 960 990 1020 1050 1080

Implementation



SUBCONTRACTING INFORMATION

The BLN Team, thoughtfully constructed for this Indiana opportunity, provides the IOED with unparalleled national expertise and an over 80-year track record of success serving the Hoosier state. Below is some detailed information on our national and local partners. Finally, as noted in the corresponding pages, our team is committed to exceeding XBE goals throughout the life cycle of this program.

Resource Innovations, Inc (RI) is an energy transformation firm. Women-led, purpose-built, and focused on impact, they are driving the material change needed to renew the promise of energy. Their comprehensive solutions build on our expertise in energy efficiency, delivering real results that mark progress toward a more sustainable, equitable future.

Responsibilities: RI is providing program planning and design services, a proven IT solution, data analysis, reporting, and retention services, and utility coordination. These services will be utilized by the BLN Team and IOED to successfully deliver the Home Energy Rebate programs across Indiana.

Address: 400 N. Michigan Avenue, Ste. S600 Chicago, IL 60611	State in Which Formed: Delaware
Form of Organization: C-Corporation	Subcontract Amount: \$7,500,000.00

EAG Gulf Coast, LLC (EA) is one of the largest business consulting firms in the world, and has assisted governmental agencies and municipalities in managing federal and state funds and provided management and oversight of large-scale programs by carefully navigating federal and state regulatory requirements, program compliance requirements, vendor management, and resource availability while working to fulfill the mission of the program.

Responsibilities: EA is providing financial controls and federal compliance services. The BLN Team will utilize their services to provide efficient, accurate rebate disbursements and contractor invoicing and ensure compliance with DOE-guidance.

Address: 8550 United Plaza Blvd., Ste. 1001 Baton Rouge, LA 70809	State in Which Formed: Delaware
Form of Organization: Limited Liability Company	Subcontract Amount: \$1,000,000.00

Sondhi Solutions (Sondhi) (MBE) is a technology company with over 250 employees focused on three core business strategies: talent recruiting, cybersecurity, and managed IT services. Sondhi Solutions currently serves 110+ Client Partners across the U.S., focusing on serving government entities and public utilities.

Responsibilities: Sondhi is providing call center and case management services. These services will be utilized by the BLN Team and IOED to address questions, concerns, and manage application status and processing.

Address: 135 N. Pennsylvania Street, Ste. 2300 Indianapolis, IN 46204	State in Which Formed: Indiana
Form of Organization: Domestic Limited Liability Company	Subcontract Amount: \$2,175,000.00

RJL Solutions (RJL) (WBE) was founded in 2017 to be a vital resource for ambitious organizations, equipping them to make connections, foster relationships and evoke change. Their unique business platform allows them to be flexible and meet the needs of the client. As change agents, they make the competitive market a winning reality. RJL Solutions strives to be the company most admired for its spirit of collaboration, integrity, and dedication to their clients, their communities, and their families.

Responsibilities: RJL adds value to the BLN Team through their community benefits and outreach and policy compliance services. We will utilize their services to promote program awareness and understanding across Indiana, including J40 communities, engage a multifaceted stakeholder group, and manage any changes in DOE guidance as the programs develop.

Address: 150 W. Market Street, Suite 700 Indianapolis, IN 46204	State in Which Formed: Indiana
Form of Organization: Domestic Limited Liability Company	Subcontract Amount: \$2,950,000.00

Veteran Strategies (IVOSB) is a multifaceted public relations firm with experience in media relations, public outreach planning, crisis communications, keynote speaking, and speech writing. Veteran Strategies is a veteran business enterprise certified by the federal government and registered with the state of Indiana.

Responsibilities: Veteran Strategies will provide public and media outreach services and assist with multi-agency coordination. The BLN Team will utilize their experience to create an IOED-branded and targeted marketing strategy, raising public awareness of the Home Energy programs, and build upon their current relationships to engage additional agencies in Indiana, maximizing the impact to Indiana residents.

Address: P.O. Box 2909, Indianapolis, IN 46206	State in Which Formed: Indiana
Form of Organization: S-Corporation	Subcontract Amount: \$975,000.00

EXPERIENCE, ROLES & RESPONSIBILITIES

Contractor Staff, Roles & Responsibilities

The BLN Team has successfully provided turnkey solutions for federally funded programs across the U.S. and, more specifically, in Indiana. We understand the limitations of the IOED and offer a single point of accountability for Indiana's energy rebate programs.



Client Staff, Roles & Responsibilities

Based upon our industry-leading experience with similar programs, we encourage the IOED to have one primary employee dedicated to the program full-time and one quarter-time employee to assist with marketing efforts. The BLN Team anticipates that the IOED's Project Manager will participate in bi-weekly meetings with the BLN Team, provide executive-level oversight and reporting on program outcomes, review and approve public messaging, and provide quarterly monitoring of the BLN Team.

Other Roles & Responsibilities

The BLN Team provides Indiana with a comprehensive and thoughtful approach to maximizing workforce opportunities. It is worthwhile to consider collaboration with **DWD** and **Ivy Tech Community Colleges** to help facilitate maximizing this opportunity. Furthermore, we encourage inter-agency coordination with other government agencies across Indiana to bridge the cost-share gap for applicants, reducing the likelihood of applicant 'walk away'.

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

Our work on the following projects has multiple similarities to Indiana's home energy rebate programs scopes, including:

- ✓ Program Design & Management
- ✓ Client Coordination & Communication
- ✓ Public Outreach (Paid & Earned Media)
- ✓ Stakeholder Outreach & Coordination
- ✓ Residential Inspections & Audits
- ✓ Energy Efficiency
- ✓ Data Tracking & Reporting
- ✓ Anti-fraud, Waste & Abuse
- ✓ Off-the-Shelf, Purpose Built IT Solution
- ✓ Program Compliance & Reporting
- ✓ Workforce Development & Job Creation
- ✓ Quality Control/Quality Assurance
- ✓ Braided Funding
- ✓ Reimbursement Program & Processing
- ✓ Contractor Coordination & Oversight
- ✓ Contract Administration & Federal Project Close-out
- ✓ Program Recipient Engagement & Support
- ✓ Call Centers
- ✓ Categorical Eligibility

Homeowner Assistance Fund, U.S. Treasury

State of Indiana Housing & Community Development Authority | 2022 - Present

We are delivering a \$167 million American Rescue Plan Act (ARPA)-funded mortgage assistance program designed to expedite the implementation and disbursement of funds to community members in greatest need. **The program is currently two years ahead of schedule and under budget.** Overall, the team is delivering a comprehensive solution that addresses the goals of transparency, accountability, and software security. Scope of services includes the design and implementation of a simple, yet compliant, program, a tailored software solution that successfully organizes and streamlines program components, case management, intake, eligibility review, application verification, fund distribution, reporting, compliance, treasury reporting, and community engagement. The team assisted the Indiana HAF program with the design and execution of the financial management system and disbursement function to provide seamless and quick payments to mortgage companies, insurance companies, homeowners associations, and taxing authorities. The team aided in the program stand-up of the financial management systems, processes, and procedures. We continue to work with internal and external stakeholders to account for and reconcile proper payments and returns and provide input into program design, policy, reporting, and system improvements. The team initiates high volumes of same-day Automated Clearing House (ACH) and check payments weekly by diligently overseeing the receipt and transfer of funds. This quick turnaround allows proper application of payments for monthly mortgage payments and other mortgage-related payments.



Due to the collaborative program design process tied to effective program management, the U.S. Treasury has named Indiana and our team the model program to be used by all 50 U.S. States.

\$167M
Funding Allocation

17K
Homeowners

30K+
ACH & Check Payments

ARPA
Funding

Program Evaluations

Duke Energy Indiana | 2015 - Present

The BLN Team provided portfolio evaluations of residential programs for Duke Energy in their Indiana service territory.

Residential HVAC (Smart \$aver) Program Evaluation. Offers existing and new construction residential customers incentives for improving their home's energy efficiency. Our team is performing the independent energy savings evaluation for this program.

My Home Energy Report (MyHER) Process & Impact Evaluation. A flagship program in Duke Energy's demand side management (DSM) portfolio, providing neighbor comparison reports to residential customers to establish a control group against which to measure the amount of energy conserved by the treated homes. We are performing impact and process evaluations for this residential behavioral conservation initiative.

Power Manager Process & Impact Evaluation. Voluntary demand-response program allowing Duke Energy to reduce the use of participating homes' central air conditioners' outdoor compressors on days with high energy demands. Spurred by our demonstrated credentials in demand response evaluation, Duke Energy selected our team to perform the impact and process evaluations for Duke Energy's Power Manager Program.

Save Energy & Water Kit Program (SEWKP) Evaluation. The SEWKP is a self-install, residential offering that provides pre-selected households with free energy-saving and water-efficiency kits. Duke Energy selected our team to estimate energy and demand savings attributable to the program based on our strong client relationship developed through the evaluation of the previous cycle of residential programs.



2,374 MWh Gross Verified Energy Savings (Smart\$aver) **53,000** Households Participated in Power Manager **500+** Annual MyHER Program Energy Savings

Home Energy Improvement & Energy Efficiency Assistance Programs

Georgia Power | 2023 - Present

Our team is supporting two residential sector programs, the Home Energy Efficiency Assistance Program (HEEAP) and the Home Energy Improvement Program (HEIP). HEEAP achieves 100% of program energy savings from serving income-qualified customers and includes a component where communities can donate to assist neighbors needing home energy efficiency upgrades or improvements. HEEAP includes single-family and multi-family residents. HEIP offers home energy assessments and rebates on energy-saving measures. We support the programs by processing customer and contractor rebate applications, providing call center support, distributing rebate checks, accurately tracking program incentive spend, integrating program participation and energy savings data into Georgia Power's tracking system, administering project quality assurance, and supporting overall Georgia Power program management and reporting.



These programs leverage our industry-leading, best-practice customer support services, where we handle approximately 60,000 calls annually and issued \$240M in 2022 with performance metrics that exceed global industry standards.

\$615K

Incentives Paid in Six Months

1,550

Applications Processed in Six Months

121.5 GWH

Energy Savings Across the Contract Term

Home Energy Savings

Commonwealth Edison, Nicor Gas, People's Gas & North Shore Gas & Northern Illinois
2022 - Present

This program is ComEd's reimagined approach to serving their residential, single-family customers through a streamlined offering that provides a range of energy efficiency upgrades and retrofit services. Core to this program is a priority for providing free energy efficiency services and education to income-eligible customers at or below 80% of area median income – a scope our team delivered for ComEd through their Income Eligible Program since 2017 for single-family and multi-family customers. As we work with ComEd, Nicor Gas, People's Gas, and North Shore Gas to evolve how they serve their residential customers, the relationships we developed with CAAs through the IE Program continue to play a vital role in program delivery. The program design and approach we provide maximizes ComEd's impact on their customers, communities, and economy through a community development and engagement solution that:



- Builds capacity for local & diverse Energy Efficiency Service Providers & community partners to expand their role in program delivery, serving as primary program ambassadors
- Channels dollars directly into communities by compensating trade allies & community partners for their role in the program & through 100% funding for projects for customers in need
- Continues to coordinate & braid funding with the Illinois Home Weatherization Assistance Program administrator to leverage federal & state funding for retrofit projects
- Improves equity & access for customer & local business participation through data-driven targeting

Our team's work in Illinois demonstrates our ability to braid complementary funding resources with utility funding to maximize energy savings and benefits to the customer.

24K

Homes Served

17.3M kWh

Electricity Saved in 2022

3.5M Therms

Natural Gas Saved in 2022

PROJECT PLANNING & APPROACH

These federally funded energy rebate programs are complex, multifaceted initiatives that require an experienced leadership team supported by subject matter experts in the various scope items for project delivery. Our approach and staffing plan to Indiana's IRA rebate programs is backed by our national expertise and familiarity with the design and delivery of federally funded individual assistance programs and energy rebate initiatives across Indiana. A qualified and experienced project leadership team is necessary from planning through implementation; thus, we are committed throughout the entire life cycle of the Indiana energy rebate programs.

Goals & Objectives

The primary goal of this initiative is to design and implement a cost-effective, efficient, transparent, and compliant program that maximizes household impact across Indiana. Based on our national experience, we know there are a multitude of goals that can be accomplished through these programs.

Success Metrics

Based upon our industry-leading expertise and decades of experience designing and administering federally funded and energy rebate programs, we understand that Indiana may seek to accomplish several goals through this initiative. We will work collaboratively with the IOED early in the planning phase and throughout the program's life cycle to ensure that the design and delivery of these rebate programs align with your objectives. Below is a table outlining some goals that could be accomplished through these federally funded energy rebate programs.

Program Goals & Objectives		
<ul style="list-style-type: none">• Compliance• Cost Effective & Efficient• Maximize Benefits to LMI Households• Low Administrative Burden	<ul style="list-style-type: none">• Maximize Job Creation• Seamless Applicant Experience• Reduce Energy Consumption• Uniformity & Standardization	<ul style="list-style-type: none">• Statewide Reach• Fast-track Career Readiness• Maximize Contracting Opportunities for Vendors• Achieve J40 Goals

Risk Management

It is imperative to note there are a number of challenges related to these programs that can impede the state of Indiana's ability to achieve such goals. We will work collaboratively with the IOED to mitigate these challenges through thoughtful design and implementation throughout the life cycle of this important initiative. The table below outlines several risks we have proactively identified and developed mitigation strategies to best position the state for programmatic success.

Program Risks & Challenges		
<ul style="list-style-type: none">• CAA Capacity• State Energy Office Capacity• Contractor Capacity & Interest• Energy Auditor Scarcity	<ul style="list-style-type: none">• Applicant Confusion• Cost-Share Gap• Supply Chain Compliance & Reporting• Fraud, Waste & Abuse	<ul style="list-style-type: none">• IT Solution• Applicant 'Walk Away' & Attrition• Buy America• J40

Stakeholders & Roles

These federally funded energy rebate programs are unique in that a diverse set of stakeholders must be thoughtfully engaged during the planning process and throughout the program life cycle. Simplistically, these stakeholders can be grouped into five distinct categories: Consumers, Contractors, Utilities, CBOs, and state, federal, and local government units. As our Community Benefits Plan outlines, the BLN Team provides an unmatched approach to comprehensive engagement across Indiana. We leverage decades of relationships with key stakeholders and groups to foster a collaborative, inclusive strategy to shape program design and execution.

Scope & Budget

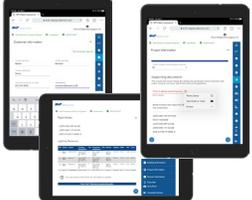
The scope for the planning phase is well-defined, with an identifiable deliverable in the form of a program plan and application to be submitted and approved by DOE. The final scope of work for program implementation will be determined through a collaborative process between the BLN Team and the IOED. Our foundational goal for these energy rebate initiatives is to create a streamlined program that decreases administrative expenses and maximizes the number of households served.

Timeline & Schedule

The BLN Team provides Indiana with an aggressive and attainable schedule for the program design phase, thus accelerating the pace of program implementation. We are proposing a 180-day schedule to complete all the required components of the program application and state blueprint and would anticipate a three-year program life cycle upon launch.

Change Management & Process Improvement

The BLN Team builds the ability to easily measure staff and program performance into its systems, processes, and procedures. These data points are integrated into iEnergy, our comprehensive IT system, which has been successfully deployed on hundreds of energy rebate programs across the U.S. We will work collaboratively with the IOED to define a final list of key performance indicators (KPIs). Our IT dashboard will transparently communicate these data points to all project stakeholders. We propose bi-weekly meetings with the IOED to review and refine our approach to facilitate an environment of consistent process improvement.

 <h3>Participants</h3> <ul style="list-style-type: none"> » Complete & Submit Applications » View & Monitor Application Status » Schedule Audit, Installation & Inspection 	 <h3>Energy Auditors</h3> <ul style="list-style-type: none"> » Encrypted & Secure Input (Photos, Participant Information) » Video Enabled for Virtual Engagement » Document Markup Capabilities » Timestamped Documentation 
 <h3>Contractors</h3> <ul style="list-style-type: none"> » Customer Communication » Subcontractor Relationship Management » Scheduling » Training 	 <h3>IOED Reporting & Business Intelligence</h3> <ul style="list-style-type: none"> » Self-Service Reporting » Advanced Visual Tools » DOE Reporting » Contractor Monitoring » Forecasting 

The BLN Solution: *The Delivery Model that Positions IOED for Success*



Because federal and DOE compliance is required for this program, Indiana's most critical decision will be which delivery model to operationalize. Having designed and delivered over 750 energy rebate programs and compliantly administered \$80 billion in federal funding, our team provides industry-leading expertise in the three delivery models commonly utilized for energy rebate programs. Below is a comprehensive analysis of the most commonly used models for energy rebate programs, along with the BLN Team's recommended approach. Below is a detailed analysis of each of the three models, along with the BLN recommendation.

Point of Sale (POS)—Non-Compliant Program

The POS delivery model is a familiar vehicle for energy rebates and relies significantly upon retailer marketing and participation. For various reasons, this delivery model increases Indiana's risk exposure, making DOE reporting virtually impossible, and does not facilitate the required statewide reach. While every delivery model comes with risks, the POS model presents more fatal flaws than others. In addition to the identified risks, the IOED cannot accurately track and monitor spending on these programs or quantify energy savings. It is an overly complex model, limiting the participation of small retailers and hindering statewide access. If the IOED were to proceed with the POS delivery model, you would be unable to ensure correct installation in participants' homes.

POINT OF SALE—NON-COMPLIANT		
STRENGTHS	WEAKNESSES	
✓ Perceived Ease	✗ High Retailer Administrative Burden	✗ Reporting
✓ Minimal Agency Impact	✗ Workforce Development	✗ Tax Calculations
✓ Scalability	✗ Inconsistent Customer Perception of 'Rebate' Based on Various AMI Factors	✗ Rural/J40 Access
	✗ Fraud, Waste & Abuse	✗ Energy Savings
		✗ QC/QA

Open Contractor Network (OCN)—Non-Compliant Program

Like the POS model, the OCN model is a commonly used delivery model; however, it does not align with many DOE program requirements and exposes Indiana to significant risks. With the OCN model, the IOED and our team would manage a continuously unknown number of participating vendors and contracts. This makes facilitating workforce development, ensuring J40 requirements are met, and staff quality control inspections difficult. It drastically increases the administrative burden for Indiana. Additionally, the OCN model relies on the contractors to raise program awareness, making it difficult to standardize communication with the applicant population, leading to unpredictability in program production rates.

OPEN CONTRACTOR NETWORK—NON-COMPLIANT

STRENGTHS

- ✓ Applicant Choice

WEAKNESSES

- ✗ Standardization
- ✗ Confusion
- ✗ Fraud
- ✗ Federal Compliance & Reporting
- ✗ Number of Vendors & Contracts the State Would Need to Manage

Closed Contractor Network (CCN)—*The BLN Model*



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

CLOSED CONTRACTOR NETWORK—RECOMMENDED

STRENGTHS

- ✓ Existing Federal Model
- ✓ Quality & Capacity Control
- ✓ Statewide Standardization
- ✓ Reporting Compliance
- ✓ Ensures Bill Neutrality or Better
- ✓ Simplifies Applicant Experience
- ✓ Delivers Synergies with CAAs & Utilities
- ✓ Maximizes Impact with Blending, Braiding & Stacking Funds
- ✓ Builds a Qualified, Certified & Competent Workforce
- ✓ Mitigates Fraud, Waste & Abuse
- ✓ Maximizes XBE Businesses & Indiana-based Contractors
- ✓ Maximizes Number of Households Served
- ✓ Reduces Administrative Expenses/Burden
- ✓ Multifaceted Approach to Exceeding J40 Requirements
- ✓ Builds an Indiana-branded Program with IOED-Aligned Controlled Messaging
- ✓ Leverages IOED's Existing Partnerships

WEAKNESSES

- ✗ Applicant Choice

INNOVATION

The BLN Advantage — Risk Mitigation, Cost & Time Savings

- Ensures Federal & J40 Compliance & Reduces the Likelihood of Fraud
- Contractors Can Buy in Bulk & Reduce Supply Chain Risk Costs
- Decreases Agency/Consultant Staffing by Minimizing Invoice Processing & Payments
- Allows the Agency to Control Applicant/Project Pull-through — Shortening Project Life Cycles

The BLN Approach: *Single & Multi-Family Programs*

Multi-Family

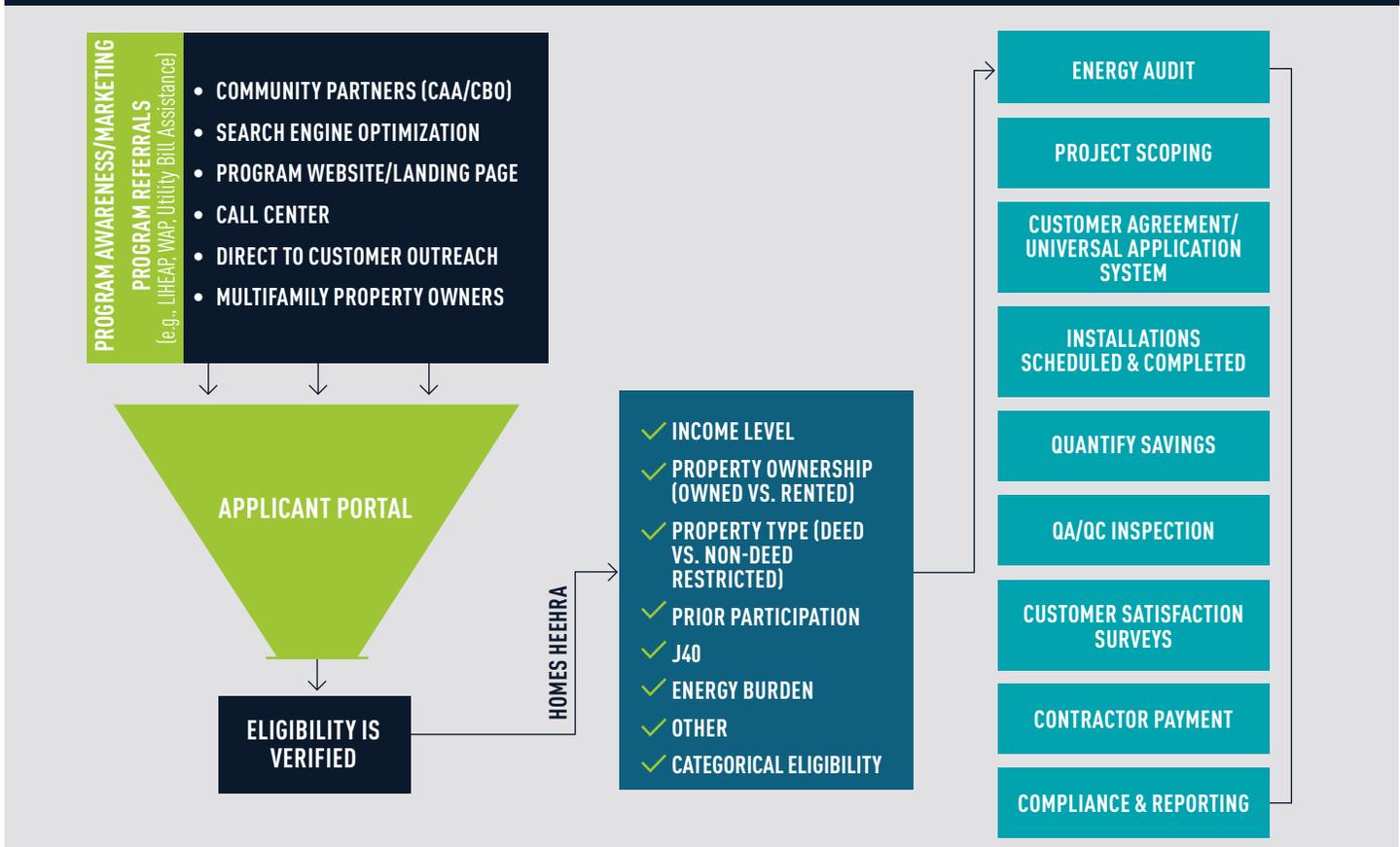
The IRA Home Energy Rebate Programs require a significant capital investment by the state in a low-income, multi-family program. The BLN Team provides extensive experience in developing and implementing multi-family energy efficiency portfolios and has developed a comprehensive strategy to execute this program cost-effectively, efficiently, and compliantly.

Multi-Family Program Benefits			
<ul style="list-style-type: none"> Over-the-Shoulder Training for Auditors & Contractors Streamlining SOPs Large, Quick Wins for IOED Raises Statewide Awareness Accomplishes J40 Goals at the Earliest Possible Date Workflow Refinement 	<ul style="list-style-type: none"> Facilitates DOE Requirements that 10% of Funds Go to LMI Multi-family Fosters Community Trust Launches the Program in a Controlled Environment Low Administrative Expenses Streamlined Applicant Experience 		
Budget		Stakeholders	
\$50 Million		Public Housing Authorities	
Anticipated Duration		Residents	
18 Months		Utility Partners	
Anticipated Launch Date		Local Elected Officials	
Q3 of 2024			
Preliminary Property Identification			
We have identified several low-income public housing complexes within J40 communities that could be viable candidates for inclusion.			
Fort Wayne		Evansville	
Whispering Oaks—24 Units McCormick Place—94 Units Beacon Heights—100 Units Tall Oaks—105 Units North Highlands—105 Units		Kennedy Towers—100 Units White Oak Manor—115 Units Schnute Apartments—115 Units John L. Caldwell Homes—186 Units	
		Gary	
		Genesis Towers—37 Units Miller Heights—53 Units Al Thomas—170 Units Concord Village—198 Units Glen Park Senior High Rise—128 Units Broadway Manor—69 Units East Point—35 Units	
Indianapolis		Muncie	
Beechwood Gardens—160 Units Blackburn Terrace—244 Units		Gillespie Tower—98 Units Earthstone Terrace—99 Units Southern Pines—100 Units	
		Michigan City	
		Lakeland Estates—50 Units Boulevard Gardens—100 Units	
		East Chicago	
		Hunter Sr. Highrise—109 Units	

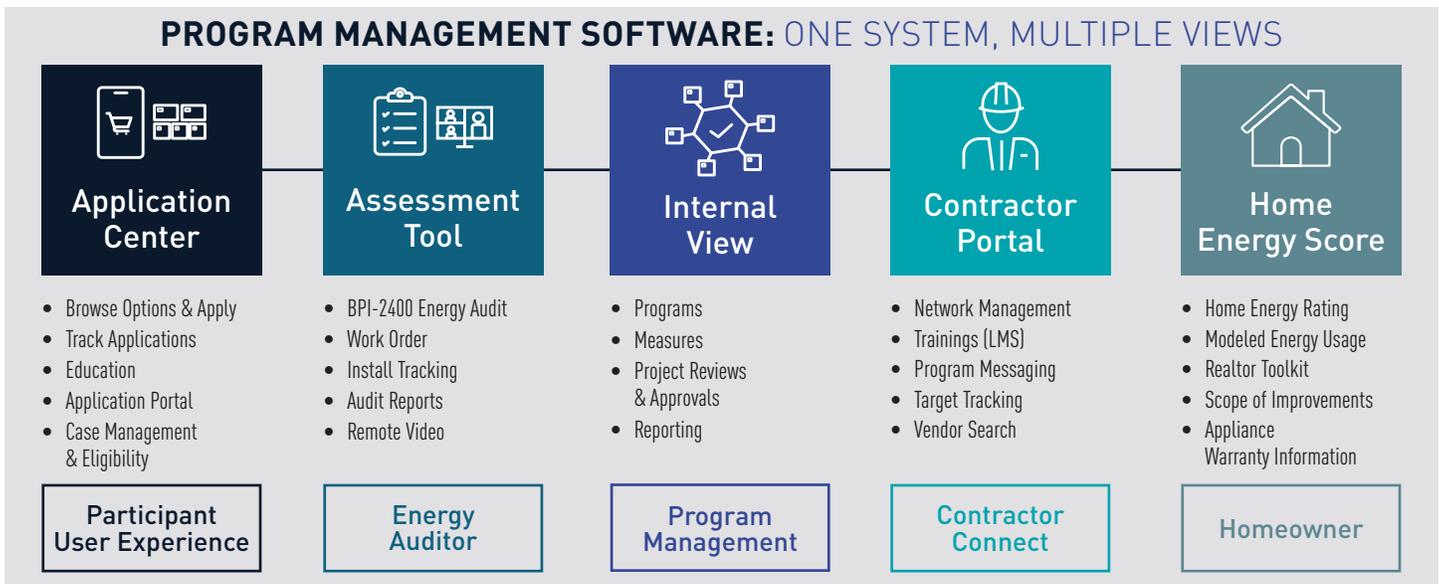
Single Family

The IRA Home Energy Rebate Programs provide a significant amount of flexibility for the state to tailor office to low-moderate income households as well as deliver a market rate offering. The BLN Team is well-versed in the design and delivery of energy rebate programs that focus on single family residences. Our approach facilitates a 92 county-wide program that delivers a cost-effective and compliant program grounded in educating and informing the applicant population while ensuring bill neutrality or better. Outlined below is our time tested business process that delivers an end-to-end applicant experience within 30 days of eligibility determination.

Participant Journey



iENERGY – A COMPREHENSIVE SOLUTION TO MANAGE & MONITOR EACH STEP IN APPLICANT LIFE CYCLE



We provide a tested, DOE-compliant system of record successfully used on hundreds of energy rebate programs nationwide. Our solution manages every step in the applicant journey and provides an audit-compliant data repository for all activities throughout the program life cycle. This system provides the IOED with an applicant portal, case management and eligibility functionality, an energy audit tool, a portal for contractor communication and invoice submission, performance/KPI monitoring, and comprehensive functionality to facilitate streamlined reporting requirements.

iEnergy provides a comprehensive and customizable IT solution deployed on over 750 energy rebate programs nationwide. It is a complete and customizable IT solution offering a centralized data repository to securely collect, store, track, and report on customer, funding, and program data. iEnergy offers:

- A fully integrated platform providing front-end applicant & market interfaces with back-end reporting to track funding & participation
- A secure online portal to facilitate program participation by applicants & market actors, including manufacturers & distributors
- A flexible, customizable solution that allows us to coordinate with utility funding
- Comprehensive data analytics & reporting to provide the IOED with the information needed to track program progress
- Automation that helps ensure accuracy & reduces the risk of human error

After thoughtful review of Attachments B1-B3, Attachment B3 (IOT Additional Terms and Conditions - Software as a Service Engagements (SaaS)) best applies to iEnergy.

iEnergy, our comprehensive program management platform, supports SAML 2.0 SSO integrations and can support integration with the Access Indiana portal. We do not foresee any issues integrating with the Access Indiana portal. Although DOE does not require HOME and HEEHRA applicants to be authenticated by the State, each state can choose to streamline access for residents participating in various sponsored programs through centralized SSO access.

The BLN Advantage



FLEXIBLE. iEnergy provides IOED and applicants the flexibility of having a central hub for programs and data across territories with specific applicant-only requirements for users or separate programs. IOED can implement multiple levels of access based on user roles to view only programs, projects, customer data, and reports based on unique needs.



COMPREHENSIVE. End-to-end program management and administration that provides IOED administrators with the ability to securely track and manage program and consumer project data across multiple program types. With iEnergy, program budgets, and project financial data will be accessible and securely shared and matched with back-office systems. Authorized staff will have access to program data to monitor portfolio, program, and project details.



AUTOMATED. iEnergy automates and streamlines project management by configuring workflows to send automatic notifications that help keep projects moving forward. iEnergy also streamlines program management by providing notifications to IOED when approvals or other reviews are needed.



REAL-TIME. IOED can instantly view program-specific performance in a dashboard for budgets and actual and projected savings. IOED can also dive into specific data to analyze various project details. IOED can configure ad-hoc and standard reports to meet internal and applicant reporting needs and regulatory requirements. iEnergy's program reporting capabilities create reports on forecasting, achieved energy savings, administrative costs, rebates paid to date, remaining rebates, contractor performance, measure, technology and equipment details, and applicant information (e.g., geographic or demographic participation information).



CONFIGURABLE. Powerful drag-and-drop tools and an easy-to-use flexible workflow engine allow us to customize new and unique program workflows for IOED to guide program processes, define milestones, run automated notifications and validations, and generate reports. IOED's program managers and administrator users will have easy access to project details, measure and equipment data, and the flexibility to drag and drop workflow configurations as program processes and rules evolve. iEnergy is designed for multiple user roles; users can view, edit, and access only the data meant for them.



CURRENT. A measure and equipment library provides IOED with a complete view of approved measures and equipment across programs. It offers the flexibility to add or update measure and rebate details as needed.

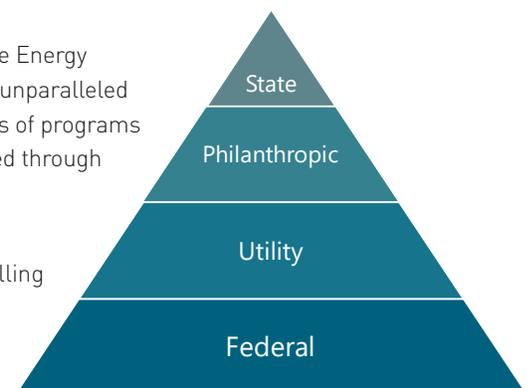


DATA PRIVACY & SECURITY. Our data privacy and information security program and practices focus on shielding and sharing information appropriately and lawfully while providing confidentiality, integrity, and availability. The iEnergy Operations team performs nightly incremental and weekly full data backups. They store data backups onsite and offsite within the continental United States. They encrypt data stored offsite via industry-standard AES 256-bit encryption for data at rest.

Maximizing Impact—Inter-Agency Coordination & Braiding Funds

The IOED must coordinate with other agencies in Indiana to successfully deliver the Home Energy Rebate programs. Jodi Golden will be leading this effort for the BLN Team. Jodi provides unparalleled expertise in leading federally funded programs, having recently led multiple of these types of programs for the Indiana Office of Community and Rural Affairs. Four key goals can be accomplished through inter-agency coordination and braiding funding from other sources.

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



The HOMES and HEERA programs contain a cost-share gap that, if not closed, creates a significant barrier to program participation, especially within Indiana's LMI population. This gap equates to a homeowner contribution of 20% of the total benefits afforded, thus

requiring the homeowner to front thousands of dollars to receive the program’s benefits. Indiana can combine these rebate dollars with other federally funded, utility, and state programs to maximize the impact on a household-by-household basis. This decreases administrative costs and maximizes the outcomes for Indiana homeowners. Additionally, many applicant homes may have pre-existing conditions that preclude their eligibility in the program. These conditions could include leaky roofs, mold, etc., that may not be able to be addressed with program dollars. Therefore, alternative funds must be identified to provide “preparedness” resources similar to the DOE Weatherization program approach.

Experience with Inter-Agency Coordination & Braiding Funding

The BLN Team provides the IOED with experience in various federal funding sources, which can be braided with these rebate dollars, and in breaking down barriers between government agencies to address fundamental program challenges that may impact the program’s success. Our funding specialists have designed and managed complex federally funded portfolios and are well-versed in multiple funding sources.

Technical Approach to Inter-Agency Coordination & Braiding Funding

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

Possible Fiscal & Service Partners	
<ul style="list-style-type: none"> Indiana Department of Workforce Development Indiana Utility Regulatory Commission Indiana Housing & Community Development Authority 	<ul style="list-style-type: none"> Indiana Office of Community Planning & Development Indiana County Commissioners Association Accelerate Indiana Municipalities

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

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

-  Weatherization/WDR
-  CDBG
-  Homeowner Assistance Funds
-  Workforce Development Resources
-  Existing Utility Programs
-  Philanthropic Resources
-  Solar For All

Coordinated Funding Streams

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

Categorical Eligibility

The BLN Team provides IOED with extensive experience managing federally funded programs and understands the intricacies of maximizing participation through the utilization of categorical eligibility. Below are some of the potential programs that could help achieve maximum benefits for Hoosiers across the state.



PROJECT MANAGEMENT

Risk & Issue Management & Escalation

As outlined in the Project Planning and Approach section, the BLN Team has proactively identified several risks that could adversely impact the IOED’s ability to accomplish its programmatic goals and objectives. Fundamentally, these risks must be thoughtfully discussed with the IOED during the program planning phase to best position the agency for programmatic success.

Based on our extensive experience in designing federally funded and energy rebate programs across the U.S., we understand that challenges will arise throughout the program’s life cycle. To appropriately position the team for success in addressing and resolving these issues, we will work collaboratively with the IOED to develop a project-specific communication plan that our project leadership team will lead and adhere to.

Change Management

Our approach to designing and implementing Indiana’s energy rebate programs is grounded in industry-leading expertise and decades of experience in Indiana and across the U.S. This unique perspective mitigates the likelihood of change orders and provides the IOED with a budget, schedule, and approach grounded in industry best practices and federal compliance. It is also imperative to note that in most federal programs, the authorizing agency (DOE) will issue new rules and guidance throughout the program’s life cycle. These changes may impact delivery decisions and levels of effort for the BLN Team. We will work collaboratively with the IOED to develop the most cost-effective strategy to accommodate any federally mandated changes.

Status Updates

As outlined in prior sections of this proposal, the BLN Team provides the IOED with the proactive identification of key milestones that will be monitored throughout the program. These KPIs will be efficiently and transparently tracked and reported to the IOED through regularly scheduled meetings. Outlined below are KPIs that may be worthy of programmatic measurement.

Potential KPIs for Programmatic Measurement

- Number of Households Served
- Average Applicant Life cycle
- Collective & Individual Contractor Performance
- XBE Participation
- J40 Benchmarks
- Feedback from Customer Satisfaction Surveys
- Type & Frequency of Change Orders
- Call Center Staffing & Performance
- Statewide Reach
- Energy Saved
- Market Transformation KPIs
- Average Size of Rebates
- All Other Data Points Required for Tracking & Compliance

TEAM MEMBER

Resumes

Jay CAHILL

Principal in Charge

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

SELECT PROJECT EXPERIENCE

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

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

Indiana Public Assistance Consulting Assistance | State of Indiana

Jay was the Principal-In-Charge for the consulting services and subject matter expertise provided to the State of Indiana related to COVID-19 pandemic impacts under FEMA's Public Assistance program, totaling almost \$2 million. He oversaw team coordination with over 1,300 schools. Services included topical research, advice based upon experience and subject-matter expertise, evaluation and qualification of an applicant under the Public Assistance Recovery program, review, research, and investigation of identified projects for red expenditures, progress reports, and records management, leading to the submission of applicant projects for reimbursement under the grant.

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

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

YEARS OF EXPERIENCE

20

EDUCATION

BS, Political Science, Loyola University

CERTIFICATIONS/LICENSES

Crime Prevention through Environmental Design (CPTED) Certified Practitioner

STATES WORKED IN

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

EXTENSIVE EXPERIENCE IN

- > Program Design & Management
- > Federally Funded Grant Management & Administration
- > Multi-agency Coordination
- > Federally Funded Program Compliance
- > Client & Contractor Coordination
- > Stakeholder Engagement & Coordination
- > Project Delivery Life-cycle
- > Quality Control/Quality Assurance
- > Maximizing DBE & Small Business Participation
- > Strategy & Road-mapping
- > Financial Management

Mark OPELKA

Project Manager - Implementation Lead

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

SELECT PROJECT EXPERIENCE

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

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

Tu Hogar Renace Step Program | Puerto Rico Department of Housing

Mark was the Operations and Invoicing Manager responsible for the management and leadership of a multi-faceted team of over 500 staff members. These teams included call center representatives, case managers, QC/QA specialists, contractor liaisons, field inspectors, and contractor invoicing analysts. Teams led by Mark efficiently managed the repair of 108,000 homes across Puerto Rico in an expedited timeline of 16 months. Mark and his team's effective policy design and quality controls allowed the team to manage nearly \$2 billion dollars worth of contractor invoices successfully and compliantly. The team closed out the program with zero findings from the Inspector General. Ninety percent of the team working for Mark comprised local employees who received training in legacy skills, including call center customer service, process analysis, construction inspections, and financial controls.

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

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

YEARS OF EXPERIENCE

15

EDUCATION

BA, Sociology,
Louisiana State University

STATES WORKED IN

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

EXTENSIVE EXPERIENCE IN

- Development & Management of Program Portfolio
- Program Design & Management
- Federally Funded Grant Management & Administration
- Multi-agency Coordination
- Federally Funded Program Compliance
- Client & Contractor Coordination
- Stakeholder Engagement & Communication
- Project Delivery Life-cycle
- Quality Control/ Quality Assurance
- Program Close-out
- Workforce Development & Training

Ron SHAW

Deputy Project Manager - Planning Lead

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

SELECT PROJECT EXPERIENCE

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

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

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

Ron provided daily project management and technical guidance for the impact evaluation of IESO's Consumer Products Heating & Cooling Incentives, Appliance Exchange, and Appliance Retirement programs. This evaluation included verifying the gross and net energy and demand impacts, reviewing program input assumptions, and assessing the cost-effectiveness.

Energy Efficiency Program Evaluation | Elizabethtown Gas

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

YEARS OF EXPERIENCE

20

EDUCATION

BS, Chemical Engineering,
University of Colorado
at Boulder

CERTIFICATIONS/LICENSES

Association of Energy
Engineers (AEE)

STATES WORKED IN

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

EXTENSIVE EXPERIENCE IN

- > Program Evaluation, Measurement & Verification
- > Market Characterization Studies
- > Conservation Planning & Program Design
- > Program Design & Management
- > Modeled vs. Measured
- > Data Analysis & Reporting

Trent BRACKENRIDGE

Senior Technical Advisor

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

SELECT PROJECT EXPERIENCE

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

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

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

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

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

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

YEARS OF EXPERIENCE

15

EDUCATION

MBA, Baylor University
BS, Agriculture Economics, University of Missouri

STATES WORKED IN

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

EXTENSIVE EXPERIENCE IN

- > Program & Project Management
- > Client Coordination & Relationships
- > Personnel Development & Management
- > Project Portfolio Management
- > Project Management Solutions
- > Strategy

Jodi GOLDEN

Cost-Share & Braiding Specialist & Risk Mitigation Lead

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

SELECT PROJECT EXPERIENCE

Executive Leadership | State of Indiana & Illinois

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

Federal Funding & Compliance Management | State of Indiana

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

Federal & State Program Design & Administration | State of Indiana

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

YEARS OF EXPERIENCE

16

EDUCATION

MPA, Public Administration,
Southern Illinois University
BS, Speech Communication,
Southern Illinois University

STATES WORKED IN

- ✓ Indiana
- ✓ Illinois

EXTENSIVE EXPERIENCE IN

- > Program Design & Management
- > Federally Funded Grant Management & Administration
- > Multi-agency Coordination
- > Federally Funded Program Compliance
- > Funding & Braiding Cost Share
- > Stakeholder Engagement & Coordination
- > Policy Development

Meg GOLDEN

Energy Rebate Specialist

Meg is a highly accomplished business process administration professional with over 11 years of robust program and project management experience in the energy efficiency and utility sectors. In her role overseeing and managing various programs, Meg is a driving force in ensuring the seamless and efficient administration of processes, contributing significantly to on-time delivery for clients. Leading a team of 28 professionals, she spearheaded the processing of an impressive \$260 million in rebates for 208,000 projects in 2022. Meg's responsibilities extend to understanding client requirements, onboarding new clients, monitoring key performance indicators to meet contractual obligations, managing client accounts, and providing detailed reporting. Her strategic guidance ensures seamless alignment of systems, protocols, team structures, software tools, and data security measures to exceed client expectations.

SELECT PROJECT EXPERIENCE

Arizona, California, & Nevada Commercial Rebate Processing Services | Southwest Gas Corporation (Nevada)

Meg has been instrumental in establishing and overseeing the client relationship with Southwest Gas for the past 8 years, managing their comprehensive rebate processing and call center services. She guides cross-functional initiatives to ensure systems, protocols, team structure, software tools, and data security measures align and exceed client expectations. Meg oversees the scoping, tracking, and reporting of client-specific KPIs, and uses that data to inform and prioritize initiatives, ensuring delivery success. Over the course of the rebate program, 624 commercial and 6,700 residential rebate applications have been processed for Southwest Gas customers. These rebate applications represent energy savings of 1,670,000 therms.

Customer Service & Rebate Processing | Energize Connecticut

Meg provided program stand-up and oversight for Energize Connecticut's customer services and rebate processing. Meg and her team worked closely with Eversource and Avangrid to distribute energy rebates to commercial clients and participating supply chain partners. She guided a team that delivered a wide range of services, including rebate processing, call center support, marketing, software development, engineering, and outreach efforts for Energize Connecticut's programs, including HVAC, water heating, food service, lab equipment, and clothes washers for commercial and industrial sectors.

Onboardings | Multiple Clients: Nationwide

Meg oversees client onboardings, inclusive of services in application processing, incentive fulfillment, customer service, reporting, and database administration. Onboardings have involved the development of custom processes and the building of custom proprietary tools.

Business Process KPI Scorecards | Multiple Clients: Nationwide

Meg led the development of a new model for managing delivery success, providing transparent communications, actively protecting the budget, and attaining the early detection of issues to remain one step ahead of problems developing. This involved the build-out of a new proprietary tool, the development of staff, and the building of new, actively managed relationships.

YEARS OF EXPERIENCE

11

EDUCATION

MBA, Business Administration, w/ concentration in Sustainability, Bainbridge Graduate Institute

BS, Architectural Studies w/ concentration in Sustainability, University of Utah

STATES WORKED IN

- ✓ Arizona
- ✓ California
- ✓ Connecticut
- ✓ Nevada
- ✓ Utah

EXTENSIVE EXPERIENCE IN

- > Program & Project Management
- > Client Coordination & Relationships
- > Stakeholder Engagement
- > Program Onboarding
- > Customer Service
- > Data Analysis

Shannon DONOHUE

Energy Modeling Specialist

With over 20 years of engineering expertise and 13 years dedicated to the utility industry, Shannon is an experienced professional renowned for managing third-party evaluations for more than 15 utility clients and leading comprehensive energy technology studies nationwide. His extensive experience spans customer baseline, HVAC performance, and energy simulation studies, accumulating over a decade of specialized knowledge in energy simulations for program planning and evaluation. Shannon excels in audits, energy simulations, and above-code programs, crafting innovative energy efficiency projects and delivering technical assistance to drive customer action. Shannon's leadership extends to in-situ technology studies for multiple clients nationwide, overseeing monitoring of energy-efficient technologies and pioneering novel approaches, such as monitoring natural gas usage in multistage heating systems. His impactful contributions also include leading residential retrofit program evaluations across various states, showcasing a comprehensive and innovative approach to advancing energy efficiency in the utility industry.

SELECT PROJECT EXPERIENCE

Energy Efficiency Program Delivery | Xcel Energy, Efficiency Works, Colorado Energy Office

Shannon leads engineering for retrofit and new construction programs in the greater Denver area, including audits, energy simulations, and above-code programs. He develops energy efficiency projects and provides technical assistance to support customer action.

Code to Zero Market Evaluation | Xcel NYSERDA (New York)

Shannon served as the lead residential modeler to develop the statewide energy savings for the Code to Zero initiative in New York. He developed baseline simulations and measured packages for single-family and multi-family dwellings to electrify New York homes. Over several weeks, he developed and ran 188 simulations across multiple climate zones and baseline characteristics to estimate the energy impacts of a net zero code.

In-Situ Technology Studies | Multiple Clients: Nationwide

Shannon has led multiple studies of in-situ monitoring of energy-efficient technologies, including mini-split heat pumps, VRF systems, evaporative coolers, economizers, lighting, air conditioners, and others. He developed monitoring plans, trained staff, and provided quality assurance on deliverables. For one utility client, he developed a novel approach to monitoring natural gas usage in multistage heating systems that was safely deployed in 44 homes in Michigan. The results were used to validate the energy simulations developed to estimate energy savings statewide for residential heating measures.

Residential Retrofit Program Evaluations | Multiple Clients: Maine, Maryland, Ohio, Illinois, Indiana, New Hampshire & Iowa

Shannon led the evaluation of energy savings for multiple residential retrofit programs, including Efficiency Maine Trust, Greater Cincinnati Energy Alliance, EMPOWER Maryland, Ameren, New Hampshire Public Service, Vectren, Black Hills Energy, and others. Tasks included conducting site verifications, interviewing homebuilders and contractors, and developing energy simulations to verify energy savings.

YEARS OF EXPERIENCE

20

EDUCATION

BS, Mechanical Engineering,
Montana State University

CERTIFICATIONS

Former HERS Rater
Energy Star® Partner

STATES WORKED IN

- ✓ Colorado
- ✓ Illinois
- ✓ Indiana
- ✓ Maine
- ✓ Maryland
- ✓ Michigan
- ✓ New Hampshire
- ✓ New York
- ✓ Ohio

EXTENSIVE EXPERIENCE IN

- > Program & Project Management
- > Energy Simulations
- > Energy Efficient Measures
- > Energy Measuring & Modeling
- > Building Science
- > HVAC
- > Energy Plus
- > REM/Rate
- > BEOPT
- > Energy Auditing
- > Stakeholder Engagement & Coordination
- > Client Coordination

Amy CAHILL

Customer Service Lead

Amy is adept at property management, overseeing the entire process from the receipt of parcel keys to demolition. Her service expertise includes timely notifications to team members upon key acceptance, facilitating coordination across various tasks such as building board-up crews, asbestos sampling/testing, waste stream surveyors, and utility disconnects. Amy has hands-on experience in managing special utility disconnects and coordinating with plumbers for water retirements, particularly in municipal areas facing limitations. Her expertise extends to document control, where she efficiently manages all unique paperwork, including parcel releases and notice-to-proceed for demolition contractors. Additionally, Amy keeps a keen eye on parcel timelines, providing comprehensive weekly status reports.

SELECT PROJECT EXPERIENCE

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

Amy serves as a senior case management lead on this \$167 million ARPA-funded mortgage assistance program that expedited the implementation and disbursement of funding to community members most in need. Overall, the team provided a turn-key solution addressing the goals of transparency, accountability, compliance, and software security. Scope of services included the accelerated design and implementation of a simple, yet compliant, program. This involved a tailored software solution that successfully organized and streamlined program components, case management, intake, eligibility review, application verification, fund distribution, reporting, compliance, treasury reporting, and community engagement. For this project, Amy assists in the development of processes and procedures for case management related to applicant eligibility, application processing, and disbursement reconciliations. The U.S. Treasury has named the State and our team the model program to be used by all 50 U.S. States.

I-69 Demolition Project | Indiana Department of Transportation (INDOT)

Amy was the utility coordination lead for INDOT's I-69 Demolition project. The I-69 project consists of 142 miles of new terrain connecting Evansville, Indiana to Indianapolis, Indiana. Amy played a vital role in the demolition project, coordinating and collaborating with utility companies along this corridor to clear the way for necessary demolitions. She assisted various utility companies with business process development and organization to streamline procedures and facilitate project delivery.

YEARS OF EXPERIENCE

5

EDUCATION

MS, Occupational Therapy,
University of Indianapolis

BS, Psychology,
University of Dayton

STATES WORKED IN

✓ Indiana

EXTENSIVE EXPERIENCE IN

- > Program & Project Management
- > Energy Simulations
- > Energy Efficient Measures
- > Energy Measuring & Modeling
- > Building Science
- > HVAC
- > Energy Plus
- > REM/Rate
- > BEOPT
- > Energy Auditing
- > Stakeholder Engagement & Coordination
- > Client Coordination

Jake DEMANN

Utility Coordination Lead

Jake is a dynamic leader in product development and solutioning, collaborating with utility clients nationwide and guiding delivery teams in program design, process development, policy guidance, measure design, and program improvements. With a robust background in demand-side management program evaluation and regulatory support, Jake has extensive experience in crafting and administering residential, commercial, and industrial energy rebate programs. As a Solution Architect, he leads the design of innovative initiatives, including Residential Pay As You Save, Small Business, Mass-market Commercial New Construction, Demand Response, and Electrification, showcasing his commitment to driving sustainable and impactful energy solutions. Jake's role extends to coordinating and presenting "Innovation Days" for clients, fostering creative thinking to address evolving energy needs.

SELECT PROJECT EXPERIENCE

Product Development | Multiple Clients: Nationwide

Jake serves as a Solution Architect, leading the design of innovative programs and products, including Residential Pay As You Save, Small Business, Mass-market Commercial New Construction, Demand Response, and Electrification, and Full Stream. He has facilitated discussions with clients, including Avangrid (CT, PA, NY), Rocky Mountain Power (UT, WY, ID), and others to explore workforce development initiatives.

Innovation Days | Multiple Clients: Nationwide

Jake has led the coordination and presentation of "Innovation Days" for clients across the country. These events are designed to engage existing and future clients to better understand their needs and think creatively about how our team can help drive energy savings and clean energy for consumers across utility service territories.

Technical Analysis | Multiple Clients: Nationwide

Jake oversees and performs technical analysis of program performance, including market assessments, measure/program cost-effectiveness, and performance modeling/forecasting. Jake also develops research summary reports and presents recommendations to various stakeholders across the company. He has assessed energy-saving technologies, evaluated generation and co-generation systems, commissioned buildings and controls systems, monitored power systems and devices, performed technical feasibility studies, and assessed new technologies.

YEARS OF EXPERIENCE

12

EDUCATION

BS, Environmental & Sustainability Studies with concentrations in City Planning & Systems Complexity/Resilience, University of Utah

AAS, Energy Management, Salt Lake Community College

CERTIFICATIONS

LEED Accredited Professional (LEED AP)

STATES WORKED IN

- ✓ Connecticut
- ✓ Idaho
- ✓ Utah
- ✓ Wyoming

EXTENSIVE EXPERIENCE IN

- > Program & Project Management
- > Energy Program Design & Delivery
- > Energy Policy
- > Stakeholder Engagement
- > Market Research
- > Workforce Development & Training
- > Program Management
- > Strategy & Road Mapping
- > Multi-Agency Coordination

Adam PERRY

IT/System of Record Lead

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

SELECT PROJECT EXPERIENCE

iEnergy Software | Cascade Natural Gas (Oregon & Washington)

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

iEnergy Software | Pacific Power (California & Washington)

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

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

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

iEnergy Software | Orlando Utilities Commission (OUC)

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

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

As Energy Solutions Supervisor and Program Manager, Adam supervised the delivery of PRPA's energy and customer solutions programs, as well as the staff, consultants, and trade allies that supported those programs. Through the design and delivery of a variety of commercial and residential DSM programs, as well as the implementation of supporting software, Adam grew PRPA's annual energy efficiency portfolio investments and savings to over \$13 million and nearly 30,000 MWhs. Adam utilizes this program knowledge to inform the iEnergy team and work with clients across the nation to strengthen their programs and software solutions.

YEARS OF EXPERIENCE

20

EDUCATION

BS, Business Management, Colorado State University

AS, Energy Management, Colorado State University

CERTIFICATIONS

LEED Accredited Professional (LEED AP)

Certified Energy Efficiency Program Manager, American Public Power Association

STATES WORKED IN

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

EXTENSIVE EXPERIENCE IN

- > Customer Service
- > Project Management Solutions
- > DSM Planning & Evaluation
- > Project Management
- > IT Software Solution Design
- > Data Analysis & Reporting
- > Stakeholder Engagement
- > Start-up Planning & Launch

Seth WATKINS

Data Analytics & Reporting Lead

Seth is a versatile professional who plays a pivotal role in directing program operations, emphasizing the seamless execution of data system updates, integrations, and ensuring robust data integrity. Serving as a key architect of measure models and forecasts, Seth goes beyond conventional boundaries, offering valuable guidance for strategic decisions related to annual savings and the targeted acquisition of incentives. His expertise encompasses the realm of conducting meticulous research and savings calculations, particularly in the integration of innovative program measures. Beyond his strategic contributions, Seth's operational acumen shines through as he efficiently manages monthly client invoices, ensuring financial precision, and meticulously oversees the accuracy of quarterly submissions. His unwavering commitment to operational excellence reflects in his ability to navigate complex program landscapes and deliver consistent, high-quality results. Seth's background, spanning program management, data analysis, and policy research, underscores his multifaceted skill set and positions him as a valuable asset in diverse professional environments.

SELECT PROJECT EXPERIENCE

Utility Program Data Management & Analysis | Multiple Clients: Ameren Missouri Single Family & Multi-family Programs

Seth oversees program operations related to data system updates and integrations, data integrity, and program incentive invoicing. He creates measure models and forecasts to guide decisions related to annual savings and incentive target acquisition and conducts research and savings calculations for new program measure additions. He also manages monthly client invoices as well as quarterly submissions. Seth was part of the original team in St. Louis and helped build the Ameren Missouri Single-Family and Multi-Family Programs.

Lighting Product Analysis | Multiple Manufacturers

In this role, Seth analyzed technical data for LED luminaires and lamps for more than 500 product applications to help manufacturers list their products on the DLC-qualified product list. He also co-managed a large manufacturer account overseeing the review of 20,000+ LED products, managed monthly program invoices, prioritized timely communication and high-quality customer support for clients and contractors, communicated program policy changes to colleagues and manufacturers, and helped manage data system updates and system issue resolution.

Literature Review | Atari Lab

Seth worked in a policy analysis research lab where he conducted a comprehensive literature review on anchors and heuristics pertaining to behavioral psychology and residential energy consumption. From this research, he designed a survey on Qualtrics testing mechanisms to positively influence perceptions of energy use in the home. He was then able to analyze the data collected from the survey using SAS and Excel, building the foundations for a research paper that was later published in Nature Energy by Marghetis et al. (2019).

YEARS OF EXPERIENCE

8

EDUCATION

MS, Environmental Science with a Concentration in Energy, Indiana University

BS, Environmental Science, Indiana University

STATES WORKED IN

- ✓ Indiana
- ✓ Missouri

EXTENSIVE EXPERIENCE IN

- > Energy Efficiency
- > Data Analysis
- > Customer Service
- > Research
- > Project Planning & Management
- > IT Software Solution

Stephanie DUNBAR

Case Management Policy Lead

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

SELECT PROJECT EXPERIENCE

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

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

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

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

YEARS OF EXPERIENCE

3

EDUCATION

BA, Special Education,
Marian University

STATES WORKED IN

✓ Indiana

EXTENSIVE EXPERIENCE IN

- > Program Design & Management
- > Process Audits & Improvement
- > Compliance, Monitoring & Reporting
- > Stakeholder Engagement & Coordination
- > Marketing & Outreach
- > Case Management
- > Financial Controls
- > Payment Processing
- > Federal Compliance
- > Federally Funded Grant Management & Administration
- > Policy Development

Joe SHARPE

Contractor Liaison

Joe brings a wealth of expertise in case management, call center oversight, data management, and reporting within the realm of federal and state-funded programs. His robust management and organizational skills ensure the fulfillment of program reporting requirements and the effective communication of key program information to clients in a clear and concise manner. With a track record of success in leading reporting activities, call center operations, and case management, Joe has demonstrated his capability to compile and consolidate vital reporting information. In his role as a project controller for the Deferred Maintenance Inspection and Estimation Services initiative, funded federally and by the state of Indiana, Joe led a sizable team in examining assets for deferred maintenance issues, submitting detailed weekly status reports on over \$200 million in construction needs.

SELECT PROJECT EXPERIENCE

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

Joe led reporting activities, call center operations, and case management for this \$167 million program. During his tenure on the Indiana HAF program, Joe led efforts to compile and consolidate reporting information for applicant intake, eligibility, call center volumes, and federal dollars approved as benefits to citizens.

Deferred Maintenance Inspection & Estimation Services | Indiana Department of Administration

Joe served as the project controller for this federal and state funded initiative. He led and managed a team of sixty field inspectors and construction estimators who examined assets for deferred maintenance issues. Additionally, Joe prepared and submitted weekly status reports regarding the over \$200 million in construction needs to Indiana.

Indiana Emergency Rental Assistance Program (IERA) | Indiana Housing & Community Development Authority

Joe provided reporting and case management services for the \$396 million IERA program. Indiana engaged the BLN Team to boost case production and improve data management protocols. In this role, he provided Indiana with recurring status reports while managing a team of five analysts. These reports included all deliverables pertaining to quarterly and annual federal reporting requirements.

YEARS OF EXPERIENCE

4

EDUCATION

BS, Business Administration, Indiana University East
(Anticipated Graduation 2024)

STATES WORKED IN

✓ Indiana

EXTENSIVE EXPERIENCE IN

- > Program Management
- > Data Analysis & Reporting
- > Customer Service
- > Call Center Operations
- > Contractor Management

Dana DAIGLE, CPA, CPE

Finance Lead

Dana has an extensive background in financial management, with over 13 years of experience in federally funded and disaster management programs. Her expertise includes financial management and disbursements, forensic accounting, compliance, litigation support, and disaster management. Dana has managed several COVID-19 relief programs, numerous settlement claims programs, and HUD-funded CDBG-DR programs. She is an excellent team leader skilled in developing system processes and controls to ensure efficient disbursement processing, quality assurance, data analysis and reporting, and stakeholder communication. Dana has been instrumental in designing and implementing policies and processes resulting in over \$3 billion in payments for multiple large-scale programs and settlement funds across the United States. She has led teams of up to 50 members for the Gulf Coast Claims Facility, Deepwater Horizon Economic and Property Damages Settlement, and the Restore Louisiana Program.

SELECT PROJECT EXPERIENCE

Indiana Homeowner Assistance Fund | Indiana Housing & Community Development Authority (IHCDA), State of Indiana

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

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

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

Restore Louisiana Program 2016 & 2020 | Division of Administration, Office of Community Development (OCD), State of Louisiana

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

State of Louisiana, U.S. Treasury Emergency Rental Assistance Program | Louisiana Housing Corporation & Office of Community Development, State of Louisiana

Dana leads the Financial Management and Disbursements Team, aiding LHC, OCD, and GOHSEP in handling the state-wide Emergency Rental Assistance Program. She supervises program finances, contributing to system setup, processes, and procedures. Dana manages fund transfers, disbursements, and reporting, along with communication to stakeholders, PMO, and the state.

YEARS OF EXPERIENCE

13

EDUCATION

MS, Accountancy,
Louisiana State University

BS, Accountancy,
Louisiana State University

CERTIFICATIONS/LICENSES

Certified Public Accountant (CPA):
Louisiana License No. 0027421

Certified Fraud Examiner (CFE):
Louisiana License No. 656204

STATES WORKED IN

- ✓ Indiana
- ✓ Louisiana
- ✓ North Carolina

EXTENSIVE EXPERIENCE IN

- > Financial Management & Disbursements
- > Disaster Management
- > Program & Project Management
- > Federal Grant Management & Administration
- > Program Close-out
- > Client Coordination
- > Stakeholder Engagement & Coordination
- > Multi-agency Coordination

Sarah IRVIN, CPA

Contractor Invoicing Manager

Sarah brings over 14 years of comprehensive expertise to her role as the Associate Director specializing in Financial Management and Disbursements. Her career spans managing and developing accounting functions, compliance, financial management, disbursements, disaster management, and quality assurance. Known for her strategic leadership and adept management skills, Sarah consistently delivers successful financial outcomes across a spectrum of diverse programs and projects. Sarah's commitment to excellence is evident in her hands-on approach to program execution, ensuring efficient disbursement and financial reporting processes while actively contributing to the development and implementation of procedures and policies. Her agile mindset and effective communication have been instrumental in navigating dynamic programs and collaborating seamlessly with stakeholders, applicants, project staff, and leadership teams throughout her career.

SELECT PROJECT EXPERIENCE

Indiana Homeowner Assistance Fund | Indiana Housing & Community Development Authority (IHCDA), State of Indiana

Sarah is the Program Manager for the Financial Management and Disbursements Team assisting IHCDA to manage the state-wide Homeowner's Assistance Fund. She oversees the design and execution of the financial management function of the program. Sarah assisted with Program standup of the financial management systems, process, and procedures. She manages team members processes, including receipt and transfers of funds, processing disbursements, and reporting on payments and statuses.

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

Sarah is the Financial Management Program Manager assisting NCORR to manage the state-wide Rebuild North Carolina program for homeowners affected by hurricanes impacting North Carolina in 2016 and 2018. Sarah is assisting with the standup of the financial management and disbursement systems, process, and procedures. She is executing along with assisting in the management of the team members to oversee receiving and transfers of funds, disbursements, and reporting on payments and statuses. Sarah works with program leadership and external parties on assisting with the development of procedures and policy implementation. Restore Louisiana Program 2016 & 2020.

State of Louisiana, U.S. Treasury Emergency Rental Assistance Program | Louisiana Housing Corporation & Office of Community Development, State of Louisiana

As Financial Management Program Manager for the Financial Management and Disbursements Team assisting The Louisiana Housing Corporation (LHC), Office of Community Development (OCD), and Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP), Sarah is assisting with the standup of the financial management systems, process, and procedures. She is executing along with assisting in the management of the team members to oversee receiving and transfers of funds, disbursements (payments to landlords, tenants, and utility companies), and reporting on payments and statuses. Sarah works with program leadership and external parties on assisting with the development of procedures and policy implementation.

YEARS OF EXPERIENCE

14

EDUCATION

BS, Accountancy,
Ferris State University

CERTIFICATIONS

Certified Public Accountant (CPA)

STATES WORKED IN

- ✓ Indiana
- ✓ Louisiana
- ✓ North Carolina

EXTENSIVE EXPERIENCE IN

- > Process & Software Implementation
- > Program & Project Management
- > Financial Reporting & Analysis
- > Cash Flow Projections & Forecast Modeling
- > Federal Grant Management & Administration
- > Financial Management & Disbursements
- > Stakeholder Engagement & Coordination
- > Disaster Management

Audrey SMITH

Close Out Specialist

Audrey has over 19 years of expertise, specializing in the management of energy efficiency programs across electric and natural gas sectors for residential, commercial, and industrial domains. Her comprehensive experience spans regulatory processes, Integrated Resource Plan (IRP) activities, and evaluations. Audrey is adept at developing portfolio operating plans, annual reports, scorecards, and quarterly regulatory filings. With a proven track record managing multi-million-dollar programs, she excels in navigating diverse stakeholder relationships and cross-functional dependencies. Audrey's strategic approach and leadership skills contribute significantly to the success of projects under her purview, reflecting a steadfast commitment to achieving optimal outcomes in the realm of energy efficiency. Her project experience includes leading a three-year regulatory filing for Indiana electric DSM programs, managing a \$14 million energy efficiency portfolio for Indiana and Ohio natural gas customers, and successfully delivering a new Marketplace and Instant Rebate delivery channel for CenterPoint Energy of Indiana. Under her guidance, this innovative program experienced exceptional success, including over 800 thermostat sales within the first week.

SELECT PROJECT EXPERIENCE

Regulatory Filing | CenterPoint Energy (Indiana)

Audrey led the three-year regulatory filing for Indiana electric DSM programs. This included the development of EE savings goals that were consistent with the Integrated Resource Plan (IRP), as well as program budgets, including the direct and indirect costs. The Plan included electric EE and DR programs for the residential, commercial, and industrial (C&I) sectors. Where appropriate, it also described opportunities for coordination with gas EE programs to leverage the best total EE and DR opportunities for customers and to share costs of delivery. Under Audrey's leadership, vendors and partners also provided technical information about measures to include recommended incentives, estimated participation, and estimated implementation costs. Finally, the plan completed a cost-effectiveness analysis of all programs, including participation rates, incentives paid, energy savings of the measure, life of the measure, implementation and administrative costs, incremental costs to the participant of the high-efficiency measure, and escalation and discount rates.

Gas Conservation Analysis | CenterPoint Energy (Indiana & Ohio)

Audrey helped manage a \$14 million energy efficiency portfolio for Indiana and Ohio natural gas customers. She provided financial analysis of monthly budget files, purchase orders, invoices, and year-end financial reconciliation; coordinated the writing, development and advertisement of department RFPs and answered bidder questions; developed and provide timely reports, presentations, and scorecard results for program stakeholders; and developed portfolio operating plans, annual reports, scorecards, and quarterly regulatory filings.

Marketplace & Instant Rebate Project | CenterPoint Energy (Indiana)

Audrey led the delivery of a new Marketplace and Instant Rebate delivery channel for CenterPoint Energy of Indiana. This project included issuing an RFP and leading the vendor selection process. Selection was followed by negotiation and execution of a master service agreement and scope of work (SOW). Audrey led the project delivery team with multiple stakeholders, including Legal, IT, Sourcing, Data Security, and the selected vendor. The program was implemented within six months and experienced great success rates, including more than 800 thermostat sales within the first week.

YEARS OF EXPERIENCE

19

EDUCATION

MBA, Western Governors University
BS, Business Management & Legal Studies, Indiana University

STATES WORKED IN

- ✓ Indiana
- ✓ Ohio
- ✓ Oregon
- ✓ California
- ✓ Washington

EXTENSIVE EXPERIENCE IN

- > Energy Rebate Program Design & Delivery
- > Project Management
- > Regulatory Requirements
- > Electric & Gas Utility Energy Rebate Programs
- > Marketing & Outreach
- > Communication
- > Stakeholder Coordination

McKenzi KUMPF

Community Benefits & J40 Specialist

McKenzi specializes in strategic planning, grants development, technical writing, and data analysis. Her unique talents and passion for both writing and video design make her a versatile asset in various aspects of the team's endeavors. Notably, McKenzie's exceptional grant writing skills have secured over \$35 million in funding for clients and community partners. In her role as the lead writer and project manager for the Wabash River Regional Development Authority (RDA), McKenzie played a pivotal role in the READI 1.0 Application & Administration, securing a \$20 million award from the IEDC for priority projects. Her contributions extended to administration, where she ensured effective communication with stakeholders, prepared written reports, and maintained the RDA's website. McKenzie's impact is a testament to her dedication to achieving strategic goals and fostering community development.

SELECT PROJECT EXPERIENCE

READI 1.0 Application & Administration | Wabash River Regional Development Authority (RDA)

McKenzi served as the lead writer and a project manager in the Wabash River RDA's application for the IEDC Regional Economic Acceleration and Development Initiative (READI). McKenzie led the proposal development by assisting stakeholders in drafting and finalizing their READI project proposals, compiling all materials from stakeholders, and prepared final written report for the Creative Strategies Department to design. McKenzie served as a final editor of the proposal prior to submission. The IEDC awarded \$20 million to the RDA to advance priority projects. Upon award, McKenzie assist in the administration of READI funds by communicating with stakeholders on materials and information, providing written reports to submit to the IEDC, and ensuring RDA's website is up-to-date.

Various NextLevel Connections Broadband Projects | Various Clients

McKenzi was the lead grant writer responsible for the drafting project narrative, attending commissioner and council meetings to discuss the project, securing letters of support from stakeholders, and reviewing final materials for submission for Next Level Connections Round 2 and Round 3. The project involved expanding clients' broadband infrastructure to unserved and underserved households, businesses, and anchor institutions within the counties of Clay, Parke, Sullivan, Vermillion, and Vigo. McKenzie assisted clients in submitting 12 applications that resulted in \$11.5 million in grant funding toward broadband expansion in West Central Indiana.

Twelve Points Revitalization Neighborhood Plan | City of Terre Haute, Indiana

McKenzi served as the lead project manager on the development and design of the Twelve Points Revitalization Neighborhood Plan. McKenzie and her team lead facilitations of public forums, data collection and analysis, and content plan development of a 5-year plan to align resources and goals to help guide the Twelve Points Revitalization board in future planning initiatives.

YEARS OF EXPERIENCE

4

EDUCATION

BS, Professional Writing, Saint Mary-of-the-Woods College

STATES WORKED IN

- ✓ Illinois
- ✓ Indiana

EXTENSIVE EXPERIENCE IN

- > Public Involvement
- > Project Management
- > Grant Administration & Compliance
- > Technical Creative Writing
- > Strategic Planning
- > Social Media Content Development

Jennifer BUTLER

AFWA & Compliance Lead

Jennifer has over 20 years in executive leadership roles at organizations dedicated to preparing, mitigating, and recovering from natural and man-made disasters. Jennifer leads large-scale disaster recovery programs involving the administration of federal funds, such as ARPA, FEMA, RESTORE Act, CARES Act, Homeland Security funding, and HUD CDBG grants. Jennifer has extensive experience in disaster recovery and grants management, including compliance, financial management, program management, grant writing, and federal regulations.

SELECT PROJECT EXPERIENCE

FEMA PA Grant Management Services | Terrebonne General Health System

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

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

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

Granting Unserved Municipalities Broadband Opportunities Program | Louisiana Office of Broadband Development & Connectivity

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

ARPA Grant Management Services | Calcasieu Parish Police Jury

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

ARPA Grant Management Services | Caddo Parish Police Jury

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

State of Louisiana's Emergency Rental Assistance Program | Louisiana Housing Corporation & Office of Community Development

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

Emergency Rental Assistance Program | Fulton County, GA

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

YEARS OF EXPERIENCE

21

EDUCATION

MS, Homeland Security Leaderships, University of Connecticut

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

Associate Certificate, Federal Contracting, George Washington University

CERTIFICATIONS

FEMA Emergency Management Institute Coursework with Certifications (8)

STATES WORKED IN

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

EXTENSIVE EXPERIENCE IN

- > Grants Management
- > Program Management
- > Federal Compliance
- > Disaster Recovery
- > Grant Writing
- > Contractor Management

Robert VANE

Communications Lead

Robert is a skilled professional with a background in directing and contributing to communication strategies for some of Indiana's most significant and high-profile projects. His extensive expertise spans coordinated and branded messaging, community outreach, public information meetings, comprehensive marketing and communications plans, media strategy implementation, and crisis communication management. In his role as Deputy Chief of Staff and Communications Director for the City of Indianapolis under Mayor Greg Ballard, Robert served as the primary media contact, excelling in crisis communication management, coordinating messaging, managing implementation teams, and leading community outreach for major initiatives. He has provided public outreach and media relations for various clients, including the Indiana Secretary of State's Office, the city of Indianapolis, Indianapolis Public Schools, Marian University, Shiel Sexton, and the Capital Improvement Board. Robert's wealth of experience in directing and contributing to communication strategies for major projects in Indiana reflects a profound understanding of the state's unique dynamics and intricacies.

SELECT PROJECT EXPERIENCE

Public Outreach & Media Relations | Various Clients

Robert provided public outreach and media relations for some of the largest projects in Indiana for clients in the private and public sector, such as the Indiana Secretary of State's Office, the City of Indianapolis, Indianapolis Public Schools, Marian University, Shiel Sexton, and the Capital Improvement Board. This work included coordinating and facilitating public information, executing strategic and grass roots media strategies, and targeted public outreach.

Deputy Chief of Staff & Communications Director | City of Indianapolis, Indiana

Robert served as the Deputy Chief of Staff and Communications Director under Indianapolis Mayor Greg Ballard. He was the primary media contact for the mayor's office and his work with Mayor Ballard included crisis communication management, coordinating messaging, managing the implementation team, and leading community outreach for numerous high-profile projects including the \$2 billion initiative by the mayor's office to transfer the water and wastewater utilities to Citizens Energy Group.

YEARS OF EXPERIENCE

14

EDUCATION

MA, Medieval History,
Indiana University-Purdue
University, Indianapolis

BA, History & Political Science,
Indiana University-Purdue
University, Indianapolis

MILITARY EXPERIENCE

United States Army,
1.1987-1.1990

Occupation: Broadcast Journalist

STATES WORKED IN

- ✓ Indiana
- ✓ New Mexico

EXTENSIVE EXPERIENCE IN

- > Public Outreach & Involvement
- > Stakeholder Engagement & Communication
- > Marketing Strategy Development
- > Public Policy
- > Technical Writing
- > Crisis Communication
- > Coordinated Messaging