

**BEFORE THE
COUNCIL OF THE CITY OF NEW ORLEANS**

**IN RE: 2024 TRIENNIAL)
INTEGRATED RESOURCE PLAN) DOCKET NOS. UD-23-01 and UD-08-02
OF ENTERGY NEW ORLEANS, LLC)**

**APPLICATION OF ENTERGY NEW ORLEANS, LLC
FOR APPROVAL OF THE ENERGY SMART PROGRAM IMPLEMENTATION PLAN
FOR PROGRAM YEARS 16 THROUGH 18**

Entergy New Orleans, LLC (“ENO” or “the Company”) respectfully submits this Application for Approval of the Implementation Plan for Program Years 16 through 18 of the Energy Smart Plan (the “Application”) and in compliance with Resolution R-23-254 (the “Resolution R-23-254”) adopted by the Council of the City of New Orleans (the “Council”) on June 8, 2023 that initiated Council docket UD-23-01, the Triennial Integrated Resource Plan of Entergy New Orleans, LLC. In the resolution, the Council ordered ENO to file an Implementation Plan for Program Years 16 through 18 (“PY16-18”) no later than June 16, 2025.

Pursuant to this directive, ENO issued a Request for Proposals (“RFP”) for the third-party administrator (“TPA”) and third-party evaluator (“TPE”) functions on January 7, 2025. Based on input from ENO’s proposed vendor selections, ENO submits its Implementation Plan for Program Years 16 through 18. A summary description of the proposed programs is set forth below.

I. Background

ENO is a limited liability company duly authorized and qualified to do and doing business in the State of Louisiana, Parish of Orleans, created and organized for the purposes, among others, of generating, transmitting, distributing, and selling electricity for power, lighting, heating, and other such uses to residential, governmental, commercial, and industrial customers throughout the City of New Orleans. ENO’s general office and principal place of business is located at 1600

Perdido Street, Building 505, New Orleans, LA 70112. ENO currently provides electric service to more than 200,000 customers in Orleans Parish.¹

Since initially receiving Council approval in 2009, and in accordance with subsequent Council approvals, ENO has been implementing the Energy Smart program. The program is currently in Program Year 15, which was approved through Council Resolution R-24-570.

II. Overview of Energy Smart Program Years 16-18

A. Residential Energy Efficiency (“EE”)

Home Performance with Energy Star (“HPwES”) – This offering will achieve long-term, significantly cost-effective electric savings through the use of local auditors and contractors who will help residential customers analyze their energy use and identify opportunities to improve efficiency. The program will install low-cost energy-saving measures and facilitate more comprehensive home efficiency projects.

HPwES will offer two levels of home energy audits:

1. The Level I Assessment: A “walk-through” inspection with direct installation of low-cost measures, such as LEDs and water conservation measures. To generate additional savings, at the time of the audit, demand response enabled smart thermostats have been added as a direct install measure.
2. Level II Assessments: Comprehensive home inspections with diagnostic testing, performed by qualified contractors, targeted to achieve deeper savings within the home.

¹ ENO currently provides natural gas service to customers in Orleans Parish. On December 19, 2024, in Docket No. UD-24-01, the Council approved the sale of ENO’s natural gas business to Delta Utilities.

To meet the needs of New Orleans' unique housing stock, which includes double shot-gun homes and smaller multifamily configurations, the program will include all buildings with four or fewer units in the HPwES offering. Structures of this size and construction type often behave more like single-family homes, with owners often occupying one of the units, thus minimizing the split-incentive barrier. Building types with two to four units function more like single-family homes, with no or small amounts of common-area space.

Retail Marketplace and Appliances - The objective of the Residential Marketplace and Appliances offering is to increase awareness and sales of efficient appliances within ENO's residential customer base. The offering will provide customers the opportunity to purchase a variety of discounted ENERGY STAR qualified or better products, either through participating retail stores or on the Energy Smart online marketplace.

The two main program activities include:

1. Retailer recruitment and merchandizing and
2. Incentive process administration (including program tracking).

Multifamily Solutions – The offering targets multifamily property owners (landlords), managers, as well as apartment and condo renters. The program will address their unique needs through a combination of incentives for both direct install and prescriptive measures, as well as through property owner and tenant education. The Multifamily Solutions offering will have a corresponding Multifamily Solutions Income-Qualified program in which multifamily property owners and renters who qualify by income will receive enough incentive to cover the entire project cost.

Income Qualified Weatherization – The Income-Qualified Weatherization offering is designed to offer qualifying customers free energy efficiency projects ranging from direct install measures,

such as LED bulbs and water savings measures, to demand response enabled smart thermostats and comprehensive envelope measures.

A/C Solutions - The A/C Solutions offering, formerly the High Efficiency AC Tune-Up program, will provide residential customers with a more comprehensive set of options to lower the energy consumption and cost associated with keeping their homes cool and comfortable in the summer. Customers with functioning ACs can improve the efficiency of their units with the help of a comprehensive AC tune-up or replacement. The offering will also include DR-enabled smart thermostats. The program will build capacity within the territory's HVAC contractor network to provide value-added services to its customers. These services are eligible to be incentivized because they go above and beyond the standard industry practices and offerings in the marketplace. The A/C Solutions offering will be cross-promoted with the other residential offerings to encourage more comprehensive energy savings. The A/C Solutions program will have a corresponding AC Solutions Income-Qualified component in which participants who qualify by income will receive enough incentive to cover the entire project cost.

School Kits, Education and Community Outreach – Targeting, the School Kit & Education offering will continue to provide the students with kits containing energy efficient items that the students will be able to use in their homes while tracking their energy savings. The program will work with local schools to enhance energy efficiency lessons and provide students with energy efficiency kits that they will install in their homes. The community outreach component will support outreach for the entire Energy Smart portfolio.

Behavioral – The Behavioral offering will provide customers with a Home Energy Report (HER) through digital or print channels. Residential customers will receive a HER that compares them to similar and efficient households, shows their end-use energy consumption, provides personalized

tips for saving energy, and directs them to other program offerings. The program design will include four paper HERs sent over the course of the year, as well as monthly digital HERs for those customers that have emails on file. Delivery of the reports will be timed to maximize energy savings around seasonal consumption peaking periods.

Residential HVAC Midstream - This offering will continue providing midstream incentives for high efficiency HVAC equipment at local distributors. The midstream solution engages HVAC manufacturers, manufacturer representative agencies and local distributors to ensure qualified efficient equipment is marked down in price with the program incentive built-in and program information on product invoicing.

Neighborhood-Based Delivery Program – The targeted neighborhood offering provides customers with no-cost energy assessments designed to help them learn how to save energy and money in their homes along with follow-up energy-saving improvements installed at no cost. The program will use a community canvassing approach through which the team works closely with ENO and stakeholders to identify neighborhoods for targeting, works with community organizations to engage potential participants, and canvasses selected neighborhood to perform no-cost assessments and energy-saving product installations.

B. Commercial and Industrial EE

Small Commercial Solutions - The Small Commercial Solutions offering will provide small businesses (100 kW demand or less) and other qualified non-residential customers the opportunity to achieve electricity savings through strategies designed specifically for this sector. This offering will help small business customers analyze facility energy use and identify energy efficiency improvement projects. Program participants will be advised on applicable offerings through the

program as well as financial incentives for eligible efficiency measures that are installed in their facilities by trade allies.

Large Commercial & Industrial Solutions - The primary objective of the Large Commercial and Industrial Solutions offering (Large C&I) is to provide a solution for larger (greater than 100 kW demand) non-residential customers interested in energy efficiency through a prescriptive or custom approach. The Large C&I offering is designed to generate significant energy savings, as well as a longer-term market penetration by nurturing delivery channels, such as design professionals, distributors, installation contractors and Energy Service Companies (ESCOs).

Schools and Universities - The APTIM team is proposing Schools and Universities as a new program offering for Program Years 16-18. Schools and universities represent a significant opportunity for community engagement and energy savings across the service territory at the various private and public K-12 organizations and higher education institutions.

Coolsaver Program - The CoolSaver Tune-Up offering focuses on improving the operating efficiency of HVAC systems in ENO's service territory, critical for businesses located in the hot and humid climate of Louisiana. While a traditional HVAC tune-up usually includes only the measurement of refrigerant and installation of a clean air filter, a CoolSaver HVAC Tune-Up also includes cleaning dirty condenser coils, evaporator coils, and blowers; measuring and correcting improper airflow; and adjusting refrigerant charge with digital accuracy.

C. Demand Response ("DR")

Bring Your Own Thermostat ("BYOT") - The residential BYOT DR offering taps into the existing installed base of connected thermostats in the ENO territory. Through technical integrations with the leading thermostat manufacturers in the industry, ENO will have the ability

to enroll, monitor, and control connected thermostats and leverage the enrolled aggregation as a capacity resource for peak demand reduction.

When a DR event is dispatched, targeted devices will experience a temperature adjustment (an “offset” or “setback”) that will in turn curtail HVAC usage during the peak period. Customers participating in the program will receive an incentive upon enrollment, as well as an ongoing annual incentive for continued participation in the program.

Peak Time Rebate Pilot - The Peak Time Rebate Pilot will engage customers to reduce energy consumption during Peak Events. The proposed Pilot allows ENO to call events year-round and will include customer engagement through email messaging. Email communications will notify customers when events are imminent and provide clear recommendations on how and when to reduce their energy consumption.

Electric Vehicle Bring Your Own Charger Pilot (“BYOC”) – The BYOC pilot will seek to shift electric vehicle (EV) load to off-peak hours, when demands on the electric system are lowest. BYOC leverages existing investments in AMI smart meter infrastructure to monitor customer electric vehicle charging behavior. The program is open to any make or model of EV using any level 2 charger.

Large Commercial Automated Demand Response (“ADR”) - The ADR program will seek to incentivize large commercial customers to allow ENO to reduce their usage during peak events. The ADR program will utilize automated controls to reduce usage by controlling lighting, HVAC and other machinery at large commercial facilities.

Battery Energy Storage System (“BESS”) – The BESS program will incentivize participants to allow ENO to discharge their solar-paired battery systems during periods of peak demand. The BESS program will utilize a Distributed Energy Resource Management System (“DERMS”)

platform to control participants' battery systems during events. In addition, the BESS program will provide upfront incentives to residential customers for purchasing battery systems that will be connected to existing or new solar installations.

In conjunction with the Plan, ENO is also filing the attached implementation report, RFP report, and other supporting documents detailing the proposed programs.

In support of the request set forth herein, ENO submits this application for the approval of Program Years 16 through 18 of Energy Smart and the accompanying proposed budget as shown in Attachment 1, the Implementation Plan Report.

III. PRAYER FOR RELIEF

WHEREFORE, ENO respectfully requests that this Council issue a Resolution:

1. Approving ENO's proposal for the implementation of the DSM programs from January 1, 2026, through December 31, 2028, as set forth in Attachments 1-7;
2. Approving ENO's selections for Third Party Administrators and Third-Party Evaluators for Program Years 16-18 as detailed in Attachments 2-8;
3. Approving the level of funding and associated kWh savings recommended for the programs, as shown in Attachment 1, the Implementation Plan Report;
4. Approving the continued use of the current UPI mechanisms for performance in Energy Efficiency, Income Qualified Energy Efficiency Programs, and Demand Response Programs;
5. Approving the continued use of the current Energy Efficiency Cost Recovery Rider for recovery of program costs;
6. Granting the opportunity for ENO to amend this implementation plan should material changes to expectations arise; and

7. Granting all other general and equitable relief that the law and the nature of this proceeding may permit or require.

Respectfully submitted:



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CERTIFICATE OF SERVICE
UD-23-01 and UD-08-02

I hereby certify that the foregoing pleading was served on all parties of record listed on the Official Service List through electronic delivery.

New Orleans, Louisiana, this 16th day of June 2025.



Lachresha D. Wilkerson



ENERGY SMART IMPLEMENTATION PLAN REPORT FOR PROGRAM YEARS 16 THROUGH 18

IMPLEMENTATION PLAN REPORT FOR PROGRAM YEARS 16-18

I. Background

Currently in its fifteenth program year, the Energy Smart program (“Energy Smart” or “Program”), is a resource for reducing energy usage for New Orleans’ residents and business owners. Energy Smart is a comprehensive portfolio of residential and commercial energy efficiency (“EE”) and demand response (“DR”) programs that provide rebates and incentives for a wide range of energy efficiency measures. In its first 14 years, Energy Smart distributed more than \$72 million in cash incentives and helped customers save more than 560 million kilowatt hours. In recognition of this success, the Department of Energy has awarded Energy Smart its Partner of the Year award four times, most recently in 2023.

The Council for the City of New Orleans (“Council”) approved Council Resolution R-23-523 which initiated Entergy New Orleans, LLCs’ (“ENO”) Triennial Integrated Resource Plan. In the resolution, the Council required ENO to file an Implementation Plan for Energy Smart Program Years (“PY”) 16 through 18. Pursuant to that requirement, ENO and the Energy Smart team has developed the accompanying Implementation Plan (“Plan”). The Plan reflects the Council’s desire to expand Energy Smart’s participation amongst income-qualified participants and within areas of the city that experience high energy burden and heat island effects. Greater than 15% savings projected in the proposed kWh targets come from programs that are exclusively for income qualified customers. In addition, the Plan continues the Neighborhood Delivery Based Program through the next three years.

The Plan also contains the design of a Battery Energy Storage System (“BESS”) program that will provide upfront incentives for the purchase of batteries for the first time in New Orleans. These batteries will further bolster the Energy Smart demand response programs.

II. Overview of the Energy Smart PY 16-18 Implementation Plan

a. Recap of Program Year 13 (“PY13”) and Program Year 14 (“PY14”) Performance

The Energy Smart Program has always been adaptable and flexible, and those traits have been a large contributing factor to program success during the current cycle. The Council and stakeholders have consistently expressed interest in broadening residential participation with a focus on our income qualified and multifamily communities and that is exactly what the program has done. In Program Years 13 and 14 the core residential programs, Home Performance with Energy Star (“HPwES”), Income Qualified Weatherization (“IQW”), and Multifamily Solutions generated savings in excess of 34 million kilowatt hours which was 106% of the kWh goal set. This success led the EPA and DOE to again name Entergy New Orleans and the Energy Smart Program as a Partner of the Year for Sustained Excellence in 2023.

The commercial programs began Program Year 13 with a bit of a headwind due to a delay in program approval which ultimately impacted Energy Smart’s ability to pre-approve projects in

late 2022. However, the commercial offerings have begun to pick up momentum primarily driven by program staff dedicated to commercial customer engagement and application assistance. The commercial programs have also seen a large increase in customer inquiries through the newly revamped Energy Smart website. This tool has been beneficial in attracting warm project leads.

b. Request for Proposals and Bidder Selection

ENO issued a Request for Proposals (“RFP”) on January 7, 2025, for Third Party Administrators (“TPA”) and a Third Party Evaluator (“TPE”) for PY16 – PY18. Please see Attachment 8 for a discussion of the RFP and the resulting selections. The table below lists the proposed program categories and corresponding selected implementers.

Type of Program	Selected Implementers
Energy Efficiency	Aptim
Residential Bring Your Own Thermostat Demand Response (“BYOT”)	EnergyHub
Battery Energy Storage System	EnergyHub
Electric Vehicle Behavioral Managed Charging Demand Response	EnergyHub
Schoolkits	National Theater for Children
Large Commercial Demand Response	Honeywell
Behavioral Energy Efficiency	Bidgely
Evaluation, Measurement and Verification	Tetra Tech

c. kWh Targets

In developing the Plan for PY16 through PY18, the Energy Smart team relied on historical results, future expectations and Program experience as well as findings from the potential study conducted by Guidehouse (“Potential Study”) for the ENO 2024 Integrated Resource Plan (“IRP”). Energy Independence and Security Act (EISA) Phase II standard enforcement, the spike in inflation, trade ally contractor labor shortages, and supply chain delays represented noteworthy challenges during the recent program cycle. This implementation plan provides aggressive budget and savings targets while being responsive to Council expectations and requirements.

Total Annual kWh Sales	
2022	5,640,495,000
2023	5,739,361,000
2024	5,634,138,000
3 Year Rolling Average	5,671,331,333

2% of Total Annual Sales	
2%	113,426,627

d. kW Reduction Targets

In PY15, the Council enacted its first Demand Response Goal for ENO. The goal was setting at acquiring 3% of system peak in callable MW. In order to calculate ENO's system peak, the rolling average peak of the previous three years is used as illustrated below

ENO Peak Load	
Year	MWh
2022	1182
2023	1208
2024	1212
Three Year Rolling Average	1201
3% of Peak Load	36.0

Given that the BESS program with upfront incentives will be a new addition to the portfolio, ENO proposes to keep the current goal of 36MW of nominated capacity for PY16.

e. Performance Incentive Mechanisms

ENO proposes to keep the current performance incentive mechanisms that have been in place for PY13 through PY15.

f. Proposed Programs

The Energy Smart team is proposing to include the following suite of programs for PY16-PY18:

Energy Efficiency

- **Residential**
 - Home Performance with Energy Star ("HPwES")
 - Income Qualified Weatherization
 - Neighborhood-Based Delivery Program
 - Multifamily Solutions
 - Multifamily Solutions Income Qualified
 - Residential Marketplace and Appliances
 - A/C Solutions
 - A/C Solutions Income Qualified
 - Residential HVAC Midstream
 - Schools Kits, Education and Community Outreach
 - Behavioral Energy Efficiency

- **Commercial and Industrial**
 - Small Commercial Solutions
 - Large Commercial & Industrial Solutions
 - Schools & Universities
 - CoolSaver

For a more in-depth discussion of the proposed EE programs, please see Attachments 2, 3 and 4.

Demand Response

- **Residential**
 - Bring Your Own Thermostat (“BYOT”)
 - Electric Vehicle Behavioral Managed Charging
 - BESS (“Battery Energy Storage System”) Program
- **Large Commercial**
 - Large Commercial Automated Demand Response (“ADR”)

For detailed discussion on the proposed demand response programs, please see Attachments 5 and 6.

g. Proposed Budgets, Targets, Utility Performance Incentive and Lost Contribution to Fixed Costs

The proposed budgets and associated savings goals for the EE and DR offerings are listed in the tables below. In compliance with Resolution R-23-553, the Plan contains a scenario that projects to generate a kWh savings rate equal to 2% of ENO’s total annual kWh sales. In addition to that scenario, the Plan also includes an option for reduced kWh savings and reduced program cost, Scenario 2 the (“Reduced Savings”) scenario.

Program Year 16 - Reduced Savings			
<u>Energy Efficiency Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Small Commercial Solutions	\$2,960,812	8,663,401	364
Large C&I Solutions	\$6,287,803	27,688,655	1,926
Schools and Universities	\$1,587,319	5,333,795	195
CoolSaver	\$856,629	4,549,095	1,403
Home Performance with Energy Star ("HPwES")	\$2,823,972	4,163,898	1,669
Retail Appliances	\$871,831	1,312,343	11
Multifamily Solutions	\$1,297,316	2,956,756	39
Income Qualified Weatherization	\$3,730,545	5,076,114	37
A/C Solutions	\$1,436,551	2,755,859	1,887
Residential HVAC Midstream	\$1,636,937	2,047,121	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$757,981	13,048,000	-
Multifamily Solutions - Income Qualified	\$1,093,438	3,002,393	44
Neighborhood-Based Delivery Pilot	\$3,432,519	4,422,565	32
A/C Solutions - Income Qualified	\$808,840	2,699,687	1,864
Energy Efficiency Subtotal	\$29,966,627	88,242,694	9,470
<u>Demand Response Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Battery Energy Storage System ("BESS")	\$2,769,438	-	6,380
Residential - BYOT	\$905,758	-	10,700
Large C&I DR	\$2,571,707	-	18,000
Bring Your Own Charger (BYOC) Pilot	\$174,704	-	80
Demand Response Subtotal	\$6,421,607		
TOTAL	\$36,388,234	88,242,694	35,160

The projected Utility Performance Incentive for achieving 100% of the kWh savings goal for Income Qualified and Non-Income Qualified, along with the expected LCFC at 100% of goal for the PY16 Reduced Savings Scenario are illustrated in the table below.

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$9,065,342	15,200,759	\$634,574	\$ 1,256,951
Non-income Qualified Total	\$20,901,285	73,041,935	\$1,463,090	\$ 6,039,838

PY17 Reduced Savings

Program Year 17 - Reduced Savings			
<u>Energy Efficiency Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Small Commercial Solutions	\$2,931,236	8,901,994	374
Large C&I Solutions	\$6,298,468	28,503,027	1,983
Schools and Universities	\$1,649,305	5,490,671	200
CoolSaver	\$944,429	4,682,892	1,444
Home Performance with Energy Star ("HPwES")	\$3,153,636	4,664,318	1,870
Retail Appliances	\$876,544	1,312,343	11
Multifamily Solutions	\$1,622,387	4,086,718	39
Income Qualified Weatherization	\$4,657,573	6,402,990	46
A/C Solutions	\$1,384,724	2,840,840	1,967
Residential HVAC Midstream	\$1,636,937	2,047,121	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$597,107	13,041,000	-
Multifamily Solutions - Income Qualified	\$1,311,007	3,347,165	49
Neighborhood-Based Delivery Pilot	\$3,816,975	4,909,048	35
A/C Solutions - Income Qualified	\$865,624	2,812,513	1,940
Energy Efficiency Subtotal	\$32,130,086	93,565,652	9,959
<u>Demand Response Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Battery Energy Storage System ("BESS")	\$3,398,208	-	12,750
Residential - BYOT	\$1,011,595	-	12,100
Large C&I DR	\$3,104,420	-	21,500
Bring Your Own Charger (BYOC) Pilot	\$174,110	-	110
Demand Response Subtotal	\$7,688,333		
TOTAL	\$39,818,419	93,565,652	46,460

The projected Utility Performance Incentive for achieving 100% of the kWh savings goal for Income Qualified and Non-Income Qualified, along with the expected LCFC at 100% of goal for the PY17 Reduced Savings Scenario are illustrated in the table below.

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$10,651,179	17,471,716	\$745,583	\$ 1,444,736
Non-income Qualified Total	\$21,478,907	76,093,936	\$1,503,523	\$ 6,292,208

PY18 Reduced Savings

Program Year 18 - Reduced Savings			
<u>Energy Efficiency Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Small Commercial Solutions	\$3,081,952	9,184,075	385
Large C&I Solutions	\$6,731,205	29,317,400	2,040
Schools and Universities	\$1,716,948	5,647,547	206
CoolSaver	\$1,046,049	4,816,689	1,485
Home Performance with Energy Star ("HPwES")	\$3,574,194	5,313,524	2,130
Retail Appliances	\$983,793	1,541,342	11
Multifamily Solutions	\$1,769,782	4,530,509	44
Income Qualified Weatherization	\$5,135,509	7,062,616	51
A/C Solutions	\$1,492,198	3,472,960	2,334
Residential HVAC Midstream	\$1,636,937	2,047,121	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$590,111	11,997,000	-
Multifamily Solutions - Income Qualified	\$1,530,620	3,785,915	54
Neighborhood-Based Delivery Pilot	\$4,353,873	5,439,756	39
A/C Solutions - Income Qualified	\$981,965	3,178,145	2,166
Energy Efficiency Subtotal	\$35,009,270	97,857,611	10,946
<u>Demand Response Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Battery Energy Storage System ("BESS")	\$4,032,186	-	19,130
Residential - BYOT	\$1,126,807	-	13,600
Large C&I DR	\$3,425,902	-	25,000
Bring Your Own Charger (BYOC) Pilot	\$180,652	-	160
Demand Response Subtotal	\$8,765,547		
TOTAL	\$43,774,817	97,857,611	57,890

The projected Utility Performance Incentive for achieving 100% of the kWh savings goal for Income Qualified and Non-Income Qualified, along with the expected LCFC at 100% of goal for the PY18 Reduced Savings Scenario are illustrated in the table below.

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$12,001,967	19,466,432	\$840,138	\$ 1,609,679
Non-income Qualified Total	\$23,007,303	78,391,179	\$1,610,511	\$ 6,482,167

2% Scenario

PY16 2% Scenario

Program Year 16 - 2% Savings Scenario			
<u>Energy Efficiency Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Small Commercial Solutions	\$4,271,000	15,035,485	631
Large C&I Solutions	\$8,499,618	41,671,426	2,899
Schools and Universities	\$2,036,305	8,027,361	293
CoolSaver	\$975,319	6,846,389	2,111
Home Performance with Energy Star ("HPwES")	\$3,048,082	4,730,188	1,896
Retail Appliances	\$936,234	1,490,821	12
Multifamily Solutions	\$1,388,617	3,358,875	44
Income Qualified Weatherization	\$5,757,780	8,038,455	58
A/C Solutions	\$1,502,959	3,130,656	2,144
Residential HVAC Midstream	\$1,762,626	2,325,529	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$757,981	13,048,000	-
Multifamily Solutions - Income Qualified	\$1,187,133	3,410,718	50
Neighborhood-Based Delivery Pilot	\$3,820,754	5,024,034	36
A/C Solutions - Income Qualified	\$877,486	3,066,845	2,118
Energy Efficiency Subtotal	\$37,206,027	119,727,794	12,292
<u>Demand Response Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Battery Energy Storage System ("BESS")	\$2,769,438	-	6,380
Residential - BYOT	\$905,758	-	10,700
Large C&I DR	\$2,571,707	-	18,000
Bring Your Own Charger (BYOC) Pilot	\$174,704	-	80
Demand Response Subtotal	\$6,421,607		
TOTAL	\$43,627,634	119,727,794	35,160

The projected Utility Performance Incentive for achieving 100% of the kWh savings goal for Income Qualified and Non-Income Qualified, along with the expected LCFC at 100% of goal for the PY16 2% Scenario are illustrated in the table below.

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$11,643,153	19,540,053	\$815,021	\$ 1,615,767
Non-income Qualified Total	\$25,562,873	100,187,742	\$1,789,401	\$ 8,284,524

PY17 2% Scenario

Program Year 17 - 2% Savings Scenario			
<u>Energy Efficiency Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Small Commercial Solutions	\$3,961,587	13,904,224	584
Large C&I Solutions	\$7,812,072	38,536,093	2,681
Schools and Universities	\$1,970,552	7,423,387	271
CoolSaver	\$1,029,329	6,331,270	1,952
Home Performance with Energy Star ("HPwES")	\$3,476,862	5,457,252	2,188
Retail Appliances	\$957,047	1,535,441	12
Multifamily Solutions	\$1,785,986	4,781,460	45
Income Qualified Weatherization	\$6,933,009	9,831,363	71
A/C Solutions	\$1,470,413	3,323,783	2,301
Residential HVAC Midstream	\$1,794,048	2,395,131	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$597,107	13,041,000	-
Multifamily Solutions - Income Qualified	\$1,445,733	3,916,183	58
Neighborhood-Based Delivery Pilot	\$4,359,125	5,743,586	41
A/C Solutions - Income Qualified	\$953,857	3,290,640	2,270
Energy Efficiency Subtotal	38,930,860	120,033,825	12,475
<u>Demand Response Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Battery Energy Storage System ("BESS")	\$3,398,208	-	12,750
Residential - BYOT	\$1,011,595	-	12,100
Large C&I DR	\$3,104,420	-	21,500
Bring Your Own Charger (BYOC) Pilot	\$174,110	-	110
Demand Response Subtotal	\$7,688,333		
TOTAL	\$46,619,193	120,033,825	46,460

The projected Utility Performance Incentive for achieving 100% of the kWh savings goal for Income Qualified and Non-Income Qualified, along with the expected LCFC at 100% of goal for the PY17 2% Scenario are illustrated in the table below.

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$13,691,724	22,781,772	\$958,421	\$ 1,883,825
Non-income Qualified Total	\$25,239,137	97,252,054	\$1,766,740	\$ 8,041,772

PY18 2% Scenario

Program Year 18 - 2% Savings Scenario			
<u>Energy Efficiency Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Small Commercial Solutions	\$4,015,506	13,635,072	572
Large C&I Solutions	\$8,071,434	37,790,128	2,629
Schools and Universities	\$1,989,006	7,279,689	266
CoolSaver	\$1,117,968	6,208,712	1,914
Home Performance with Energy Star ("HPwES")	\$3,942,112	6,190,256	2,481
Retail Appliances	\$1,080,835	1,795,664	12
Multifamily Solutions	\$1,950,077	5,278,043	52
Income Qualified Weatherization	\$7,429,772	10,562,192	76
A/C Solutions	\$1,593,495	4,045,998	2,719
Residential HVAC Midstream	\$1,789,427	2,384,896	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$590,111	11,997,000	-
Multifamily Solutions - Income Qualified	\$1,684,395	4,410,590	63
Neighborhood-Based Delivery Pilot	\$4,957,651	6,337,315	46
A/C Solutions - Income Qualified	\$1,078,562	3,702,538	2,524
Energy Efficiency Subtotal	\$41,674,485	122,141,105	13,355
<u>Demand Response Program</u>	<u>Program Cost</u>	<u>kWh</u>	<u>kW</u>
Battery Energy Storage System ("BESS")	\$4,032,186	-	19,130
Residential - BYOT	\$1,126,807	-	13,600
Large C&I DR	\$3,425,902	-	25,000
Bring Your Own Charger (BYOC) Pilot	\$180,652	-	160
Demand Response Subtotal	\$8,765,547		
TOTAL	\$50,440,032	122,141,105	57,890

The projected Utility Performance Incentive for achieving 100% of the kWh savings goal for Income Qualified and Non-Income Qualified, along with the expected LCFC at 100% of goal for the PY18 2% Scenario are illustrated in the table below.

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$15,150,380	25,012,636	\$1,060,527	\$ 2,068,295
Non-income Qualified Total	\$26,524,105	97,128,470	\$1,856,687	\$ 8,031,553

h. Evaluation, Measurement & Verification (“EM&V”)

EM&V is included in the above tables at 4.0% of the total program costs. A detailed discussion of proposed EM&V activities for PY13-15 can be found in Attachment 7.

III. Cost Recovery

ENO proposes that program costs and UPI continue to be recovered through the Energy Efficiency Cost Recovery (“EECR”) rider.

IV. Typical Bill Impact

The estimated typical bill impact for customers based on their rate class is shown in the table below.

ENO Typical Monthly Bill Impacts Reduced Savings Scenario			
	PY 16	PY 17	PY 18
Typical Bill Impact (1,000 kWh residential customer)	\$ 9.41	\$ 10.59	\$ 11.81
Typical Bill Impact (9,125 kWh commercial customer)	\$ 35.60	\$ 35.24	\$ 37.06
Typical Bill Impact (91,250 kWh industrial customer)	\$ 540.35	\$ 573.48	\$ 617.63

ENO Typical Monthly Bill Impacts 2% Scenario			
	PY 16	PY 17	PY 18
Typical Bill Impact (1,000 kWh residential customer)	\$ 10.56	\$ 12.07	\$ 13.38
Typical Bill Impact (9,125 kWh commercial customer)	\$ 51.35	\$ 47.63	\$ 48.28
Typical Bill Impact (91,250 kWh industrial customer)	\$ 673.22	\$ 665.25	\$ 698.14



January 1, 2026 – December 31, 2028 Program Years 16-18 Energy Smart Energy Efficiency Demand Side Management Plan

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Entergy New Orleans, LLC (ENO) selected Aptim Environmental & Infrastructure, LLC (APTIM) as the Third-Party Administrator (TPA) to deliver the demand side management programs within the Energy Smart portfolio for the period of January 1, 2026 to December 31, 2028. APTIM will be retained by ENO to implement, deliver, administer and conduct Quality Control/Quality Assurance (QC/QA) and some measurement and evaluation of the energy conservation and demand side management programs as approved by the Council for the City of New Orleans (Council). The Energy Efficiency (EE) plan, outlined in this document, details the updated proposed design, budgets, and savings targets for the Energy Smart portfolio in Program Years 16, 17 and 18.

The APTIM team completed the analysis and recommendations detailed in this implementation plan utilizing historical participation results, best practices of energy efficiency programs, stakeholder comments filed in Docket UD-22-04 and the 2024 DSM Potential Study performed by Guidehouse. Additional impact factors considered include Energy Independence and Security Act (EISA) Phase II standard enforcement, the spike in inflation, trade ally contractor labor shortages, and supply chain disruptions. This implementation plan provides two aggressive budget and savings targets while meeting requirements included in Resolution R-23-553.

APTIM will continue to work with ENO, the Council and its Advisors (Advisors), as well as other stakeholders to ensure the continuous progression and evolution of the Energy Smart program. In response to comments filed in Docket UD-22-04, the APTIM Team has designed income-qualified (IQ) tracks for all residential offerings and included a neighborhood-based delivery offering. This plan significantly increases the energy savings targets of the residential portfolio, and more than 20% of annual portfolio energy savings are planned in programs that target IQ customers.

The Energy Smart residential portfolio has historically achieved a large portion of savings from LED lighting. Due to Energy Independence and Security Act (EISA) Phase II standard enforcement, LED lighting savings will not be eligible for Energy Smart savings during Program Years 16, 17 and 18. This represents a drastic change in the Energy Smart residential portfolio resulting in increased non-lighting measures and program costs. Stakeholder comments filed in Docket UD-22-04 acknowledged the higher cost of residential portfolio savings when compared to the commercial portfolio and emphasized the desire for further increase of IQ residential offerings despite acknowledging that IQ savings are typically more expensive per unit saved than commercial program savings.

This implementation plan provides detail on the program designs, savings targets, budgets, and proposed enhancements of the Energy Smart program. The following table shows the program offerings from Program Year 15 relative to the proposed offerings for Program Years 16, 17 and 18 with more details on each offering included within this plan.



PORTFOLIO	PY 15 PROGRAM OFFERINGS	PY 16-18 PROGRAM OFFERINGS
RESIDENTIAL	Home Performance with Energy Star ("HPwES")	Home Performance with Energy Star ("HPwES")
	Income Qualified Weatherization	Income Qualified Weatherization
	Neighborhood-Based Delivery Pilot	Neighborhood-Based Delivery Program
	Multifamily Solutions	Multifamily Solutions
	Multifamily Solutions Income Qualified	Multifamily Solutions Income Qualified
	Retail Appliances	Residential Marketplace and Appliances
	Retail Appliances Income Qualified	
	A/C Solutions	A/C Solutions
	A/C Solutions Income Qualified	A/C Solutions Income Qualified
	Residential HVAC Midstream	Residential HVAC Midstream
	School Kits, Education and Community Outreach	School Kits, Education and Community Outreach
COMMERCIAL & INDUSTRIAL	Small Commercial & Industrial Solutions	Small Commercial Solutions
	Large Commercial & Industrial Solutions	Large Commercial & Industrial Solutions
	Publicly Funded Institutions	Schools & Universities
	New Construction Code Compliance	CoolSaver Tune-up

1. Residential Offerings

The Residential portfolio provides a comprehensive and holistic approach in helping all of ENO's residential customers, including Income Qualified customers, make smart energy decisions. The proposed programs offer solutions at all levels for residential consumers – from the shopper purchasing a rebated smart thermostat online, to the homeowner prepared to make a long-term investment in their home's energy performance.

Home Performance with Energy Star ("HPwES") – This offering takes a whole-house approach to improving energy efficiency. Energy Smart certified Energy Advisors help residential customers analyze their energy use and identify and complete comprehensive energy efficiency upgrades. The offering includes a home energy assessment which may also recommend follow up measures to be completed by trade ally contractors. The home energy assessment includes a walk-through inspection and direct installation of low-cost measures such as high-efficiency showerheads and water aerators, smart power strips, pipe wrap and smart thermostats. The home energy assessment may recommend follow-up measures which require diagnostic testing targeted to achieve deeper savings in the home. Follow-up measures, completed by an Energy Smart approved trade ally include attic insulation, air conditioning tune-up, air sealing, and duct sealing.

To meet the needs of New Orleans' unique housing stock of double shot-gun homes and smaller multifamily configurations, APTIM will include all buildings with four or fewer units



in the HPwES offering. Structures of this size and construction type often behave more like single-family homes, with owners often occupying one of the units, thus minimizing the split-incentive barrier.

Proposed ideas for continuations, enhancements and expansions to the HPwES offering include:

- Continue to provide the assessment self-scheduling tool available to customers through the Energy Smart website. This tool will also be used by Thrive New Orleans, the local non-profit partner supporting community outreach for the Energy Smart program.
- Deploy propensity modeling to customize offerings to the customer. Using advanced analytics, Franklin Energy identifies ideal program participants and scores eligible customers based on their likelihood to participate in relevant programs and adopt energy-saving measures.
- Utilize GIS mapping to identify areas of Orleans Parish experiencing greatest consequences of heat island effect to target program outreach.

Income-Qualified Weatherization – The Income-Qualified Weatherization offering (IQW) is designed to offer qualifying customers no-cost participation in the whole-house approach of the Home Performance with ENERGY STAR program. APTIM and program partners work to identify and qualify customers for participation. Energy Smart certified Energy Advisors help customers analyze their energy use and provide direct installation of energy efficient equipment such as water savings measures and smart thermostats. Qualifying follow-up measures are completed by an Energy Smart approved trade ally at no cost to the income-qualified customer, including attic insulation, air conditioning tune-up, air sealing, and duct sealing.

Proposed ideas for continuation, enhancements and expansions for the Income-Qualified Weatherization offering include:

- Involve stakeholders to coordinate program access for customers in need with Total Community Action (TCA), Low-Income Home Energy Assistance Program (LIHEAP), Weatherization Assistance Program (WAP), Alliance for Affordable Energy, Thrive New Orleans and other community-based organizations.
- Utilize GIS mapping with census tract data to identify areas of Orleans Parish with the highest energy burden to target program outreach.
- Continue to work with Thrive New Orleans to generate awareness of and participation in the program. This includes program information tables at neighborhood events, Entergy Walk-In Payment Centers, and working with organizations such as food banks and other assistance programs.

Neighborhood-Based Delivery Program – The targeted neighborhood offering provides customers with no-cost energy assessments designed to help them learn how to save energy and money in their homes along with follow-up energy-saving improvements installed at no cost. The program will use a community canvassing approach through which the team works closely with ENO and stakeholders to identify neighborhoods for targeting,



works with community organizations to engage potential participants, and canvasses selected neighborhood to perform no-cost assessments and energy-saving product installations.

The program will select and pre-qualify an eligible, census-defined target neighborhood of approximately 500 to 1,000 homes. Program engagement will first focus on residents who reside within pre-selected neighborhoods that have 50% or more residents who fall below 80% of Area Median Income or census tracts with high energy burden. Residents in targeted neighborhoods receive a program brochure with information about scheduling a no-cost home energy assessment and an invitation to a neighborhood kick-off event to learn more about the program. Program personnel can conduct energy assessments and install free energy-saving products the same day as the kick-off event or can schedule a more convenient time for the customer. Based on the energy assessment results, participants also receive information about additional free efficiency improvements completed by local trade ally contractors. Neighborhood kick-off events will host trade ally contractors to familiarize residents with the contractors and offer direct and expedited scheduling for installation of the weatherization measures (air sealing, duct sealing, attic insulation). The time spent in a neighborhood is estimated to be three months.

For multifamily complexes in the neighborhood, outreach will be performed prior to the event to engage building owners in the multifamily program. If the landlord declines to participate in the standard Multifamily Solutions offering, a behavioral education component and energy efficiency kit can be provided to interested residents.

This new offering will include pilot measures to help address urban heat island effect including cool roofs, covered A/C units, shade techniques and window film. There will also be additional incentive funds for health and safety measures to reduce weatherization barriers.

Initial Marketing:

- Postcards
- Eblast
- Online marketing (Nextdoor, Facebook) in the targeted neighborhood
- Marketing packages for community-based organizations that serve targeted area
- Canvassing prior to kick-off event by Thrive New Orleans

Neighborhood Kick-off:

- Kick-off event with meal
 - Invited guests include community partners, Councilmembers, Mayor or Office of Resilience and Sustainability (ORS) representation, and Council Utilities Regulatory Office representation.
 - Invite other relevant neighborhood resources to participate.
 - Provide behavioral education options for reducing energy use.
- Coordinate tree planting to take place shortly after kick-off event to provide additional opportunity to reduce urban heat island effect.



Multifamily Solutions – This offering targets multifamily property owners (landlords) and managers, as well as apartment and condo renters. The offerings will address their unique needs through a combination of incentives for both direct install and prescriptive measures, and through property owner and tenant education. Direct install measures include water-saving showerheads, faucet aerators and smart thermostats. A property must have a minimum of five units to qualify for Multifamily Solutions. This allows for the Multifamily Solutions offering to be more focused on the unique needs of owners, managers and renters of larger buildings. Multifamily Solutions works with property owners to serve the entire property with appropriate energy saving measures. There is no cost to the renter in this offering.

Proposed ideas for continuations, enhancements and expansions for the Multifamily Solutions offering include:

- Add content for customer education including behavioral tips for reducing energy use in an apartment.
- Additional measures to include TSV (thermostatic valve) showerheads and tub spouts.

Multifamily Solutions Income Qualified – This offering targets multifamily properties with over 50% of apartment units with rental subsidies or verified income qualified tenants. Thrive New Orleans, the program's local non-profit outreach partner, will play a key role to better serve multifamily properties with low-income tenants. The Multifamily Solutions Income Qualified track provides the same services, benefits and measures as the market rate offering with additional support for property management to assist in serving all units in the complex. The weatherization measure incentives have also been increased for air sealing, duct sealing and attic insulation, to increase adoption by property owners. The program team will increase coordination with Louisiana Housing Corporation (LHC), Housing Authority of New Orleans (HANO) and Greater New Orleans Housing Alliance (GNOHA), Vietnamese Initiatives in Economic Training (VIET), and Total Community Action (TCA) to reach affordable housing more effectively. There is no cost to the renter in this offering.

Residential Marketplace and Appliances – The objective of the Retail Appliances offering is to increase awareness and sales of efficient equipment and appliances to ENO's residential population. The Online Marketplace will continue to provide an opportunity for customers to access instant rebates for online purchases of energy efficient equipment including smart thermostats, advanced power strips, pipe insulation, water savers and dehumidifiers. The Residential Appliances offering provides customers the opportunity to purchase a variety of discounted products that are ENERGY STAR qualified or better including refrigerators, window air conditioners, heat pump water heaters, dehumidifiers, and pool pumps. Participating retailers include national partners, like The Home Depot, as well as local partners, like the Green Project, to achieve a blend of large and small retailers.

Proposed ideas for continuations, enhancements and expansions for the Residential Marketplace and Appliances offering include:



- Retail program will not include rebates or energy savings on LED lighting this cycle due to EISA standards enforcement. LED lighting will remain available on the Online Marketplace without Energy Smart program rebates as a value add to customers shopping for energy-efficient products.
- Expand the in-store marketing to include non-lighting products, such as additional smart thermostat models, refrigerators, freezers, dehumidifiers, and air purifiers.
- Cross-promote retail smart thermostat signage with Demand Response (DR) program to increase conversion of smart thermostat purchases into DR enrollments.
- Increased incentives for Heat Pump Water heaters to increase adoption with the federal tax incentives.
- Additional measures to include air purifier kit and ENERGY STAR clothes washers and dryers.

A/C Solutions – The A/C Solutions offering will provide residential customers with a comprehensive set of options to help lower the energy consumption associated with keeping their homes cool and comfortable in the summer. In addition to tune-ups and high efficiency replacements, A/C Solutions will offer duct sealing and smart thermostat measures. The program will enhance the ability within the territory's HVAC contractor network to provide value-added services to its customers. These services are eligible to be incentivized because they surpass the standard industry practices and offerings in the marketplace. The A/C Solutions offering will be cross promoted with the other residential offerings to encourage more comprehensive energy savings.

Proposed ideas for continuations, enhancements and expansions to the A/C Solutions offering include:

- Cross-market the Demand Response offerings to participants in A/C Solutions through participating HVAC contractors.
- Recruit additional local HVAC contractors to provide comprehensive A/C tune ups.
- Promote A/C replacement rebates at the Point-of-Purchase for HVAC Entergy New Orleans customers in the surrounding area.

A/C Solutions Income Qualified – This A/C Solutions offering will provide income qualified residential customers with a comprehensive set of options to help lower the energy consumption associated with keeping their homes cool and comfortable in the summer. The income qualified track provides increased incentives for A/C tune ups to ensure no out-of-pocket cost for this service. Similar to the Income Qualified Weatherization offering, customers would self-attest to their income to take part in the increased incentives included in the A/C Solutions Income Qualified offering. Promotion of the A/C replacement rebates will also be increased at local independent retailers.

Residential HVAC Midstream – This offering will continue providing midstream incentives for high efficiency HVAC equipment at local distributors. The midstream offering is designed to address the downstream program barriers including customers unaware of program incentives, customers who cannot afford incremental costs, and unengaged HVAC contractor base. The midstream solution engages HVAC manufacturers, manufacturer



representative agencies and local distributors to ensure qualified efficient equipment is marked down in price with the program incentive built-in and program information on product invoicing. The midstream offering will reach customers and influence efficient equipment sales that are not captured in the traditional downstream A/C Solutions program. The incentives allow product distributors to educate, motivate and engage HVAC contractors to create market transformation.

School Kits, Education and Community Outreach – The National Theatre for Children (NTC), in coordination with ENO, will recruit, enroll, deliver energy efficiency curriculum and disperse school kits to 4,100 students each year and secure installation to ENO residences to promote behavior change and create lifelong energy-smart ENO customers.

Community Outreach: Thrive New Orleans, a local non-profit, will support community outreach for the entire portfolio. They support in-person events and resource fairs with information table and Home Energy Assessment self-scheduling. In this program cycle Thrive will also add neighborhood canvassing to outreach tactics.



2. Commercial & Industrial Offerings

The proposed offerings included within APTIM's Commercial and Industrial portfolio are provided below along with information on innovations and enhancements for consideration during implementation of PY16-18. The program designs align with the programs discussed in the 2024 Potential Study performed by Guidehouse Inc. The C&I portfolio will offer prescriptive offerings, making it easier for customers and trade allies to participate, while increasing overall cost-effectiveness of the C&I portfolio. Incentives and savings for prescriptive measures are based primarily on measures in the New Orleans Technical Reference Manual (TRM). For all offerings, APTIM will facilitate feedback sessions involving ENO, members of the Trade Ally Advisory Group (TAAG), and other stakeholders to identify and evaluate innovative options for program enhancement throughout the program cycle.

Small Commercial Solutions - The Small Commercial Solutions offering will provide small businesses (100 kW demand or less) and other qualified non-residential customers the opportunity to achieve electricity savings through strategies designed specifically for this sector. This offering will help small business customers analyze facility energy use and identify energy efficiency improvement projects. Program participants will be advised on applicable offerings through the program as well as financial incentives for eligible efficiency measures that are installed in their facilities by trade allies.

Proposed ideas for continuations, enhancements and expansions to the Small Commercial Solutions offering include:

- Continue to expand trade allies participating in the Small Business Direct Install offering by supporting aggressive recruitment efforts.
- Expand list of Small Commercial equipment replacement measures.
- Increase targeted marketing to promote non-lighting measures with no or low upfront cost including AC tune-ups, smart thermostats and refrigeration measures.
- Utilize digital marketing assets to target specific small business types including eating places, small groceries and beauty salons to highlight the benefits of participating in Energy Smart's Small Commercial Solutions offerings.
- Increase the cost-effectiveness of program delivery with a focus on non-lighting measures such as refrigeration, ENERGY STAR cooking equipment and high efficiency HVAC upgrades and tune-ups.
- Continue to partner with the Downtown Development District and New Orleans Chamber of Commerce to promote Energy Smart offerings.
- Maintain Spanish and Vietnamese-language collateral pieces to target Spanish and Vietnamese speaking communities to raise awareness of Small Commercial Solutions offerings including no-cost Small Business Energy Assessments.
- Facilitate trade ally coordination and partnerships to expand services to small commercial customers.
- Engage with City leadership including the Mayor's Office, Office of Economic Development and City Council to promote Energy Smart to small businesses and



raise awareness of the program.

- Integrate Energy Smart offerings into existing processes and procedures at Entergy New Orleans including the Customer Service Department and Region Engineering Department to engage with customers adding or expanding load.

Large Commercial & Industrial Solutions – The primary objective of the Large Commercial and Industrial Solutions offering (Large C&I) is to provide a solution for larger (greater than 100 kW demand) non-residential customers interested in energy efficiency through a prescriptive or custom approach. The Large C&I offering is designed to generate significant energy savings, as well as a longer-term market penetration by nurturing delivery channels, such as design professionals, distributors, installation contractors and Energy Service Companies (ESCOs).

Proposed ideas for continuations, enhancements and expansions for the Large Commercial & Industrial Solutions offering include:

- Increase the number of prescriptive incentive offerings to make it easier for customers and trade allies to estimate program incentives and participate in program offerings.
- Promote Building Automation System upgrades and retro-commissioning (RCx) projects to mid-sized facilities. These measures offer attractive paybacks and are historically promoted to larger facilities such as hospitals and universities.
- Update Account Management Plans for 100+ Large C&I customers with Managed Accounts.
- Recruit Large C&I customers to participate in the Strategic Energy Management offering to educate facility managers on energy efficiency potential in their buildings and drive energy savings for Large C&I customers beyond low-hanging measures such as lighting.
- Launch a commercial midstream program targeting measures that are underutilized in downstream delivery such as HVAC replacements and kitchen equipment.
- Increase the cost-effectiveness of program delivery with a focus on non-lighting measures such as BAS upgrades, retro-commissioning and HVAC upgrades/optimization.
- Partner with various local chambers of commerce including the New Orleans Chamber of Commerce to promote Energy Smart offerings to new and existing chamber members.
- Facilitate trade ally coordination and partnerships to expand services Large C&I customers.
- Engage with City leadership including the Mayor's Office, Office of Economic Development and City Council to promote Energy Smart to all Large C&I customers throughout the ENO service territory.
- Integrate Energy Smart offerings into existing processes and procedures at Entergy New Orleans including the Customer Service Department and Region Engineering Department to engage with customers adding or expanding load.
- Expand support for Large C&I customers to include connection to LSU Industrial Assessment Center to provide energy audit and identify energy efficiency measure opportunities.



- Engage with procurement officials for large customers such as the City of New Orleans Property Management Department, Sewerage and Water Board, and Regional Transit Authority to include Energy Smart in procurement language for new projects.

Schools and Universities – The APTIM team is proposing Schools and Universities as a new program offering for Program Years 16-18. Schools and universities represent a significant opportunity for community engagement and energy savings across the service territory at the various private and public K-12 organizations and higher education institutions. APTIM has worked with school administrators and facility directions at nearly all of the higher education and K-12 schools in Orleans Parish and are well positioned to leverage this experience to continue to encourage ongoing participation in the Energy Smart program.

Engaging with schools and universities before finalizing budgets is critical to ensuring they have funds for energy efficiency projects. Meetings with facility directors will take place in the first quarter to determine the types of energy-saving projects they are considering for the school year. Energy Smart will establish project plans with participating schools by May, as School districts in Orleans Parish finalize budgets in late spring or early summer. Outreach support staff will connect facility directors with trade ally contractors to generate quotes that include Energy Smart incentives. This helps decision-makers understand the out-of-pocket costs required for each project so that funding can be reserved. The APTIM team will use over 2,000 completed commercial projects to identify projects that require minimal or no out-of-pocket cost, such as BAS upgrades, continuous commissioning, and HVAC tune-up measures. The APTIM team understands the funding challenges faced by schools and universities and will leverage program experience to address these challenges in this sector specific offering.

CoolSaver Tune-Up - The CoolSaver Tune-Up offering focuses on improving the operating efficiency of HVAC systems in ENO's service territory, critical for businesses located in the hot and humid climate of Louisiana. While a traditional HVAC tune-up usually includes only the measurement of refrigerant and installation of a clean air filter, a CoolSaver HVAC Tune-Up also includes cleaning dirty condenser coils, evaporator coils, and blowers; measuring and correcting improper airflow; and adjusting refrigerant charge with digital accuracy. CLEAResult's recommended delivery strategy for the CoolSaver HVAC Tune-Up Program will take advantage of the thorough processes and tools in place through the established CoolSaver HVAC Tune-Up model. This reduces costs while streamlining the delivery for Energy Smart. Through the CoolSaver HVAC Tune-Up model, the local participating trade allies are the primary sales force and delivery channel for the program. As such, successful trade ally engagement, training, and management are prioritized for program success.

The APTIM team recommends adding the CoolSavers offering to expand commercial customers' participation in the Energy Smart program.

CoolSavers benefits include:

- Increased consumer awareness and understanding/importance of the benefits of a highly tuned central air conditioning and heat pump system.



- Strengthened brand awareness of the Energy Smart program as a trusted partner in energy efficiency.
- Additional customer channel through which Energy Smart can identify and communicate other commercial energy efficiency offerings to customers.
- High kWh savings per measure relative to incentive cost, which allow broader customer participation with set program budgets.

Background and Overview

The following provides additional detail on the approach and background of the proposed program designs, budgets, and savings targets included in this implementation plan.

1. *Plan to Save 2% of Annual Sales*

This proposed PY16-18 plan includes a scenario with energy savings and budget forecasts that seeks to align with the Council's recommendation in Resolution R-17-30 that ENO provide a scenario that would increase kWh savings by .2% annually until a goal of 2% annual kWh savings is achieved. Program savings and incentives for the 2% scenario are derived from the 2024 Potential Study by Guidehouse.

2. *Commercial Portfolio Offerings*

The proposed commercial portfolio program design makes significant offering updates in this program cycle including discontinuing an offering exclusive to new construction projects, altering the public entities program to focus on schools and universities and adding a standalone commercial AC tune-up offering. The Program Team recommends discontinuing a new construction offering because the Louisiana State Legislature adopted advanced energy building codes IECC 2021 effective as of July 2023. This advancement in code will require new construction projects to integrate energy efficiency in building design and construction and the Energy Smart program will not incentivize efficiency required by code. The Program Team has also recognized the school system in Orleans Parish faces unique challenges with public school facilities owned by Orleans Public School Board and leased on a short-term basis to Charter Networks responsible for maintenance and utility costs. These customers benefit from a targeted approach for Energy Smart measure offerings and incentives which will be designed in the new Schools and Universities offering to replace the former Publicly Funded Institutions offering. The stand-alone AC tune-up program, CoolSavers, focuses on improving the operating efficiency of HVAC systems, critical for businesses located in the hot and humid climate of New Orleans.

3. *EISA Phase II Standards*

The proposed program design incorporates the Energy Independence & Security Act (EISA) Phase II standards, which began being fully enforced in PY13. On April 26, 2022, the Department of Energy issued an Enforcement Policy Statement indicating an accelerated timeline for implementation of the new General Service Lamps (GSLs) efficiency standards. The enforcement timeline pertains to two rules issued by the DOE including expanded definition of GSL to include majority of screw-based lighting products and imposing a 45 lumen per watt minimum efficiency requirement for all GSLs.



Combined, these rules will eliminate nearly all A-line, reflector, and specialty incandescent and halogen products from the market, and in turn change the baseline equipment for Energy Smart savings calculations. APTIM has confirmed with the Program Evaluator this precludes savings from being claimed for Retail Lighting and kit distribution channels.

The EISA ruling has had substantial direct impacts on the Energy Smart Program. All measures addressing GSLs are affected by the ruling with elimination from the portfolio in PY15. Beginning July 1, 2023, the Retail Lighting & Appliances program no longer provided rebates to offset the cost of LED bulbs in retail stores. Lighting savings accounted for 13.5 million kWh (87%) of the Retail Lighting and Appliances program in PY11. Instead, the program has shifted focus to ENERGY STAR appliances, smart thermostats and other equipment offered on the Online Marketplace at a significantly higher cost per kWh than historically seen with retail lighting.

There are substantial indirect impacts from the EISA ruling. The Energy Smart team anticipates that the elimination of measures involving GSLs will reduce contact points between the Energy Smart Program, trade allies and Energy customers. LED retrofit projects often serve as customers' first exposure to the Energy Smart program and often lead to additional non-lighting efficiency projects. Reducing or eliminating lighting projects therefore reduce program participation generally. The loss of relatively low cost and high impact of LED retrofit projects also impacts program- and portfolio-level cost effectiveness, which leads to unfavorable impacts metrics such as Total Resource Cost.

4. *TRM Development and Evaluation Coordination*

The planning inputs used to derive the savings and budget estimates within this implementation plan were created using national energy efficiency best practices, past participation, potential studies and through coordination with the existing Evaluation, Measurement and Verification (EM&V) consultant for the Energy Smart programs. The savings are based on assumptions from the available New Orleans Technical Reference Manual (TRM).

The APTIM team will continue to coordinate with the EM&V consultant throughout this program cycle. The team will make ongoing updates to savings methodologies and tools to comply with the New Orleans TRM updates and ensure that energy savings can be claimed for new measures where sufficient supporting documentation can be provided.

5. *Evaluation Measurement and Verification (EM&V) Budget*

The budgets outlined within this plan include an allocation toward EM&V, which totals 4% of the annual budget for the relevant offerings.

6. *Budget Flexibility*

The APTIM Team's experience has shown that program implementation often occurs at different rates for different programs, and that these implementation rates can vary significantly from predictions in program applications that formed the basis for program approval. Additionally, this program cycle incorporates several income qualified offerings and design elements. For this reason, it is important that there continue to be budget flexibility within each rate class.



7. *Marketing Planning and Strategy*

In advance of each program year, APTIM develops a Marketing Plan to map out umbrella marketing initiatives for the full program year ahead. Program level plans will be developed using an integrated multi-channel approach, interacting with customers via multiple channels, deepening the impact of individual tactics. Included within the Plan will be full-year marketing engagement calendars that will serve as the basis for campaign-level coordination for program staff at ENO, APTIM and program partner marketing teams.

The marketing tactics and channels employed for Energy Smart will continue to include:

Direct to Customer/trade allies

- Bill Inserts
- Case Studies
- Digital Advertising
- Direct Mailers
- Education and Training
- Email
- Incentive Applications
- Newsletters
- Program Fact Sheets
- Social Media Content
- Trade Ally Portal
- Website Content

Brand Awareness and Program Recognition

- Applications for Industry Awards
- Articles for Newsletters and Industry Publications
- Cross Promotion of Programs
- Customer/trade ally Recognition
- Earned Media
- Industry Event Participation
- Memberships and Sponsorships
- Partnerships with Industry Associations and Organizations
- Conference Presentation/Abstracts
- Social Media Engagement
- Workforce Development

The Plan will detail the innovative programmatic approach to meeting annual savings goals, furthering awareness of the program and ensuring the delivery of the right message to the right audience at the right time. The team maintains a focus on brand awareness utilizing E-newsletter content and out of home marketing (billboards, bus shelters/wraps). In PY15, APTIM added support from Thrive New Orleans in canvassing outreach and collateral material for neighborhood-based delivery pilot program.

Portfolio Budgets and Savings

Two budget and savings scenarios are included within this PY16-18 implementation plan to provide an understanding of costs and savings associated with varying levels of program funding. APTIM and implementation partners carefully considered recommendations made in the Docket UD-22-04 which included the Advisors' Recommendations¹, and detailed program proposals from Alliance for Affordable Energy, Sierra Club and more. These recommendations were largely focused on the residential portfolio as ENO has a greater number of residential customers.

¹ Advisors' Report Regarding Parties Proposed Changes and Additional Guidance, Council Docket UD-22-04, March 1, 2023



The “2% Goal” scenario:

This scenario includes energy savings and budget forecasts that align with the Council’s recommendation in Resolution R-23-553 that ENO provide a program plan that would include kWh savings aligned with 2% of annual sales. This scenario is utilizing savings and incentive costs included in the most recent 2024 DSM Potential Study, however the study implies that reaching Commercial & Industrial savings to this level would require incentive budget ten times what the program is able to provide cost effectively.

2% GOAL SCENARIO - PORTFOLIO BUDGETS			
	Year 16	Year 17	Year 18
Residential Total	\$20,665,805	\$23,560,214	\$25,890,460
EM&V	\$819,930	\$935,795	\$1,029,076
Program Costs	\$19,845,875	\$22,624,419	\$24,861,383
C&I Total	\$15,782,241	\$14,773,539	\$15,193,915
EM&V	\$631,774	\$591,395	\$608,223
Program Costs	\$15,150,467	\$14,182,144	\$14,585,691
Energy Smart Total	\$36,448,046	\$38,333,754	\$41,084,374
EM&V	\$1,451,704	\$1,527,190	\$1,637,300
Program Costs	\$34,996,342	\$36,806,563	\$39,447,075

2% GOAL SCENARIO - PORTFOLIO SAVINGS			
	Year 16	Year 17	Year 18
Residential Total			
Participation	23,511	25,812	27,976
Gross Energy Savings (MWh)	35,099	40,798	45,231
Gross Demand Savings (MW)	6.36	6.99	7.97
C&I Total			
Participation	2,698	2,495	2,446
Gross Energy Savings (MWh)	71,581	66,195	64,914
Gross Demand Savings (MW)	5.93	5.49	5.38
Energy Smart Total			
Participation	26,209	28,307	30,422
Gross Energy Savings (MWh)	106,680	106,993	110,144
Gross Demand Savings (MW)	12.29	12.47	13.35



The “Proposed Savings” scenario:

This scenario includes aggressive but achievable portfolio goals utilizing historical results, current market conditions and best practices of energy efficiency programs. The proposed portfolio savings goal in this scenario is an achievable total and utilizes potential study “high case” goals for select residential offerings. This scenario reduces overall program costs over the full three-year cycle by \$20.7 million total vs. the 2% Goal scenario in the 2024 Potential Study.

PROPOSED SAVINGS SCENARIO - PORTFOLIO BUDGETS			
	Year 16	Year 17	Year 18
Residential Total	\$17,516,084	\$19,709,542	\$21,843,005
EM&V	\$693,844	\$781,650	\$867,054
Program Costs	\$16,822,240	\$18,927,892	\$20,975,951
C&I Total	\$11,692,562	\$11,823,439	\$12,576,155
EM&V	\$468,062	\$473,301	\$503,433
Program Costs	\$11,224,501	\$11,350,138	\$12,072,722
Energy Smart Total	\$29,208,646	\$31,532,980	\$34,419,160
EM&V	\$1,161,906	\$1,254,951	\$1,370,486
Program Costs	\$28,046,740	\$30,278,030	\$33,048,673

PROPOSED SAVINGS SCENARIO - PORTFOLIO SAVINGS			
	Year 16	Year 17	Year 18
Residential Total			
Participation	20,735	22,205	24,141
Gross Energy Savings (MWh)	28,960	32,946	36,895
Gross Demand Savings (MW)	5.58	5.96	6.83
C&I Total			
Participation	1,673	1,721	1,773
Gross Energy Savings (MWh)	46,235	47,579	48,966
Gross Demand Savings (MW)	3.89	4.00	4.12
Energy Smart Total			
Participation	22,408	23,926	25,914
Gross Energy Savings (MWh)	75,195	80,525	85,861
Gross Demand Savings (MW)	9.47	9.96	10.95



Net Benefits and Cost Effectiveness Analysis

The tables below summarize the cost effectiveness results for both the Total Resource Cost test (TRC) and the Utility Cost test (UCT), sometimes referred to as the Program Administrator Cost test (PACT). The screening tool relies on the most recent avoided costs determined through calculations that are consistent with the methodology that was implemented in the Entergy New Orleans Integrated Resource Plan (IRP). As instructed in R-23-553, income qualified offerings are excluded from total cost effectiveness testing and scores are shown using both the weighted average cost of capital (WACC) and societal discount rate.

PORTFOLIO COST EFFECTIVENESS ANALYSIS (WACC) – 2% GOAL SCENARIO			
Offering	TRC BENEFITS (\$)	TRC RATIO	UCT RATIO
Small Commercial Solutions	\$13,255,731	1.3	1.1
Large C&I Solutions	\$48,728,510	1.6	2.0
Schools & Universities	\$9,162,477	1.5	1.5
CoolSavers Tune-up	\$15,259,809	2.9	4.9
Home Performance with Energy Star (“HPwES”)	\$18,691,470	2.9	1.8
Income Qualified Weatherization	\$12,048,435	1.6	0.6
Neighborhood-Based Delivery Pilot	\$7,244,725	1.6	0.6
Multifamily Solutions	\$5,410,741	1.9	1.1
Multifamily Solutions Income Qualified	\$4,811,198	1.9	1.1
Residential Marketplace and Appliances	\$1,407,393	0.6	0.5
A/C Solutions	\$6,922,044	1.8	1.5
A/C Solutions Income Qualified	\$5,484,253	4.5	1.9
Residential HVAC Midstream	\$2,726,326	0.5	0.5
School Kits, Education and Community Outreach	\$232,473	0.1	0.2
TOTAL	\$151,370,352	1.7	1.3



PORTFOLIO COST EFFECTIVENESS ANALYSIS (SOCIETAL DISCOUNT RATE) – 2% GOAL SCENARIO			
Offering	TRC BENEFITS (\$)	TRC RATIO	UCT RATIO
Small Commercial Solutions	\$16,121,334	1.6	1.3
Large C&I Solutions	\$60,688,874	1.9	2.5
Schools & Universities	\$11,519,825	1.9	1.9
CoolSavers Tune-up	\$18,506,732	3.5	5.9
Home Performance with Energy Star (“HPwES”)	\$24,494,009	3.8	2.3
Income Qualified Weatherization	\$16,154,065	2.2	0.8
Neighborhood-Based Delivery Pilot	\$9,713,402	2.1	0.7
Multifamily Solutions	\$7,070,592	2.5	1.4
Multifamily Solutions Income Qualified	\$6,285,802	2.5	1.5
Residential Marketplace and Appliances	\$1,667,144	0.7	0.6
A/C Solutions	\$8,928,729	2.4	2.0
A/C Solutions Income Qualified	\$7,338,815	6.1	2.5
Residential HVAC Midstream	\$3,507,069	0.7	0.7
School Kits, Education and Community Outreach	\$232,473	0.1	0.2
TOTAL	\$192,228,864	2.1	1.7



PORTFOLIO COST EFFECTIVENESS ANALYSIS (WACC) – PROPOSED SAVINGS SCENARIO			
Offering	TRC BENEFITS (\$)	TRC RATIO	UCT RATIO
Small Commercial Solutions	\$8,360,394	1.1	0.9
Large C&I Solutions	\$35,378,756	1.5	1.8
Schools & Universities	\$6,653,285	1.3	1.3
CoolSavers Tune-up	\$11,074,649	2.5	3.9
Home Performance with Energy Star (“HPwES”)	\$16,136,134	2.7	1.7
Income Qualified Weatherization	\$7,863,406	1.5	0.6
Neighborhood-Based Delivery Pilot	\$6,254,245	1.5	0.5
Multifamily Solutions	\$4,665,627	1.7	1.0
Multifamily Solutions Income Qualified	\$4,153,890	1.7	1.1
Residential Marketplace and Appliances	\$1,215,583	0.5	0.4
A/C Solutions	\$5,977,368	1.7	1.4
A/C Solutions Income Qualified	\$4,736,173	4.0	1.8
Residential HVAC Midstream	\$2,355,533	0.5	0.5
School Kits, Education and Community Outreach	\$217,240	0.1	0.2
TOTAL	\$115,042,282	1.5	1.2



PORTFOLIO COST EFFECTIVENESS ANALYSIS (SOCIETAL DISCOUNT RATE) – PROPOSED SAVINGS SCENARIO

Offering	TRC BENEFITS (\$)	TRC RATIO	UCT RATIO
Small Commercial Solutions	\$10,157,046	1.3	1.1
Large C&I Solutions	\$44,062,943	1.8	2.3
Schools & Universities	\$8,365,227	1.7	1.7
CoolSavers Tune-up	\$13,431,107	3.1	4.7
Home Performance with Energy Star (“HPwES”)	\$21,145,371	3.5	2.2
Income Qualified Weatherization	\$10,543,030	2.0	0.8
Neighborhood-Based Delivery Pilot	\$8,385,383	2.0	0.7
Multifamily Solutions	\$6,096,740	2.2	1.3
Multifamily Solutions Income Qualified	\$5,427,302	2.3	1.4
Residential Marketplace and Appliances	\$1,439,938	0.6	0.5
A/C Solutions	\$7,710,154	2.1	1.8
A/C Solutions Income Qualified	\$6,337,885	5.3	2.4
Residential HVAC Midstream	\$3,030,084	0.6	0.6
School Kits, Education and Community Outreach	\$232,473	0.1	0.2
TOTAL	\$146,364,685	1.9	1.5



Program Budgets and Savings

The following tables represent the budget and savings totals for the program portfolio from PY16 thru PY18.

PROGRAM YEAR 16 - PORTFOLIO BUDGET AND SAVINGS - 2% GOAL SCENARIO						
Offering	EM&V	Program Costs	Total	Participation	Gross Energy Savings (MWh)	Gross Demand Savings (MW)
Small Commercial Solutions	\$170,971	\$4,100,029	\$4,271,000	1,352	15,035	0.63
Large C&I Solutions	\$340,246	\$8,159,372	\$8,499,618	170	41,671	2.90
Schools & Universities	\$81,515	\$1,954,790	\$2,036,305	47	8,027	0.29
CoolSavers Tune-up	\$39,043	\$936,276	\$975,319	1,129	6,846	2.11
Home Performance with Energy Star ("HPwES")	\$122,017	\$2,926,065	\$3,048,082	1,721	4,730	1.90
Income Qualified Weatherization	\$230,488	\$5,527,292	\$5,757,780	1,818	8,038	0.06
Neighborhood-Based Delivery Pilot	\$152,948	\$3,667,806	\$3,820,754	1,136	5,024	0.04
Multifamily Solutions	\$55,587	\$1,333,030	\$1,388,617	1,720	3,359	0.04
Multifamily Solutions Income Qualified	\$47,522	\$1,139,612	\$1,187,133	2,012	3,411	0.05
Residential Marketplace and Appliances	\$37,478	\$898,756	\$936,234	3,001	1,491	0.01
A/C Solutions	\$60,165	\$1,442,795	\$1,502,959	1,506	3,131	2.14
A/C Solutions Income Qualified	\$35,126	\$842,359	\$877,486	1,506	3,067	2.12
Residential HVAC Midstream	\$70,559	\$1,692,066	\$1,762,626	4,991	2,326	0.00
School Kits, Education and Community Outreach	\$8,040	\$376,094	\$384,134	4,100	523	0.00
TOTAL	\$1,451,704	\$34,996,342	\$36,448,046	26,209	106,680	12.29



PROGRAM YEAR 17 - PORTFOLIO BUDGET AND SAVINGS - 2% GOAL SCENARIO						
Offering	EM&V	Program Costs	Total	Participation	Gross Energy Savings (MWh)	Gross Demand Savings (MW)
Small Commercial Solutions	\$158,585	\$3,803,002	\$3,961,587	1,250	13,904	0.58
Large C&I Solutions	\$312,723	\$7,499,349	\$7,812,072	157	38,536	2.68
Schools & Universities	\$78,883	\$1,891,669	\$1,970,552	43	7,423	0.27
CoolSavers Tune-up	\$41,205	\$988,124	\$1,029,329	1,044	6,331	1.95
Home Performance with Energy Star ("HPwES")	\$139,181	\$3,337,681	\$3,476,862	1,986	5,457	2.19
Income Qualified Weatherization	\$277,533	\$6,655,476	\$6,933,009	2,223	9,831	0.07
Neighborhood-Based Delivery Pilot	\$174,499	\$4,184,626	\$4,359,125	1,299	5,744	0.04
Multifamily Solutions	\$71,494	\$1,714,492	\$1,785,986	2,448	4,781	0.05
Multifamily Solutions Income Qualified	\$57,874	\$1,387,859	\$1,445,733	2,310	3,916	0.06
Residential Marketplace and Appliances	\$38,311	\$918,736	\$957,047	3,091	1,535	0.01
A/C Solutions	\$58,862	\$1,411,552	\$1,470,413	1,599	3,324	2.30
A/C Solutions Income Qualified	\$38,184	\$915,674	\$953,857	1,615	3,291	2.27
Residential HVAC Midstream	\$71,817	\$1,722,231	\$1,794,048	5,141	2,395	0.00
School Kits, Education and Community Outreach	\$8,040	\$376,094	\$384,134	4,100	523	0.00
TOTAL	\$1,527,190	\$36,806,563	\$38,333,754	28,307	106,993	12.47



PROGRAM YEAR 18 - PORTFOLIO BUDGET AND SAVINGS - 2% GOAL SCENARIO						
Offering	EM&V	Program Costs	Total	Participation	Gross Energy Savings (MWh)	Gross Demand Savings (MW)
Small Commercial Solutions	\$160,744	\$3,854,763	\$4,015,506	1,226	13,635	0.57
Large C&I Solutions	\$323,105	\$7,748,329	\$8,071,434	154	37,790	2.63
Schools & Universities	\$79,621	\$1,909,385	\$1,989,006	43	7,280	0.27
CoolSavers Tune-up	\$44,753	\$1,073,215	\$1,117,968	1,024	6,209	1.91
Home Performance with Energy Star ("HPwES")	\$157,806	\$3,784,306	\$3,942,112	2,253	6,190	2.48
Income Qualified Weatherization	\$297,419	\$7,132,353	\$7,429,772	2,389	10,562	0.08
Neighborhood-Based Delivery Pilot	\$198,458	\$4,759,193	\$4,957,651	1,433	6,337	0.05
Multifamily Solutions	\$78,063	\$1,872,014	\$1,950,077	2,703	5,278	0.05
Multifamily Solutions Income Qualified	\$67,428	\$1,616,967	\$1,684,395	2,602	4,411	0.06
Residential Marketplace and Appliances	\$43,267	\$1,037,569	\$1,080,835	3,614	1,796	0.01
A/C Solutions	\$63,789	\$1,529,706	\$1,593,495	1,946	4,046	2.72
A/C Solutions Income Qualified	\$43,176	\$1,035,386	\$1,078,562	1,818	3,703	2.52
Residential HVAC Midstream	\$71,632	\$1,717,795	\$1,789,427	5,119	2,385	0.00
School Kits, Education and Community Outreach	\$8,040	\$376,094	\$384,134	4,100	523	0.00
TOTAL	\$1,637,300	\$39,447,075	\$41,084,374	30,422	110,144	13.35



PROGRAM YEAR 16 - PORTFOLIO BUDGET AND SAVINGS – PROPOSED SAVINGS SCENARIO						
Offering	EM&V	Program Costs	Total	Participation	Gross Energy Savings (MWh)	Gross Demand Savings (MW)
Small Commercial Solutions	\$118,523	\$2,842,288	\$2,960,812	779	8,663	0.36
Large C&I Solutions	\$251,705	\$6,036,097	\$6,287,803	113	27,689	1.93
Schools & Universities	\$63,542	\$1,523,778	\$1,587,319	31	5,334	0.19
CoolSavers Tune-up	\$34,291	\$822,338	\$856,629	750	4,549	1.40
Home Performance with Energy Star (“HPwES”)	\$113,046	\$2,710,926	\$2,823,972	1,515	4,164	1.67
Income Qualified Weatherization	\$149,336	\$3,581,208	\$3,730,545	1,148	5,076	0.04
Neighborhood-Based Delivery Pilot	\$137,406	\$3,295,113	\$3,432,519	1,000	4,423	0.03
Multifamily Solutions	\$51,932	\$1,245,383	\$1,297,316	1,514	2,957	0.04
Multifamily Solutions Income Qualified	\$43,771	\$1,049,667	\$1,093,438	1,771	3,002	0.04
Residential Marketplace and Appliances	\$34,900	\$836,931	\$871,831	2,642	1,312	0.01
A/C Solutions	\$57,506	\$1,379,045	\$1,436,551	1,326	2,756	1.89
A/C Solutions Income Qualified	\$32,378	\$776,462	\$808,840	1,325	2,700	1.86
Residential HVAC Midstream	\$65,528	\$1,571,409	\$1,636,937	4,394	2,047	0.00
School Kits, Education and Community Outreach	\$8,040	\$376,094	\$384,134	4,100	523	0.00
TOTAL	\$1,161,906	\$28,046,740	\$29,208,646	22,408	75,195	9.47



PROGRAM YEAR 17 - PORTFOLIO BUDGET AND SAVINGS – PROPOSED SAVINGS SCENARIO						
Offering	EM&V	Program Costs	Total	Participation	Gross Energy Savings (MWh)	Gross Demand Savings (MW)
Small Commercial Solutions	\$117,339	\$2,813,897	\$2,931,236	800	8,902	0.37
Large C&I Solutions	\$252,132	\$6,046,336	\$6,298,468	116	28,503	1.98
Schools & Universities	\$66,023	\$1,583,283	\$1,649,305	32	5,491	0.20
CoolSavers Tune-up	\$37,806	\$906,623	\$944,429	772	4,683	1.44
Home Performance with Energy Star (“HPwES”)	\$126,242	\$3,027,394	\$3,153,636	1,697	4,664	1.87
Income Qualified Weatherization	\$186,446	\$4,471,127	\$4,657,573	1,448	6,403	0.05
Neighborhood-Based Delivery Pilot	\$152,796	\$3,664,179	\$3,816,975	1,110	4,909	0.04
Multifamily Solutions	\$64,945	\$1,557,441	\$1,622,387	2,093	4,087	0.04
Multifamily Solutions Income Qualified	\$52,481	\$1,258,527	\$1,311,007	1,975	3,347	0.05
Residential Marketplace and Appliances	\$35,089	\$841,455	\$876,544	2,642	1,312	0.01
A/C Solutions	\$55,432	\$1,329,293	\$1,384,724	1,366	2,841	1.97
A/C Solutions Income Qualified	\$34,652	\$830,972	\$865,624	1,381	2,813	1.94
Residential HVAC Midstream	\$65,528	\$1,571,409	\$1,636,937	4,394	2,047	0.00
School Kits, Education and Community Outreach	\$8,040	\$376,094	\$384,134	4,100	523	0.00
TOTAL	\$1,254,951	\$30,278,030	\$31,532,980	23,926	80,525	9.96



PROGRAM YEAR 18 - PORTFOLIO BUDGET AND SAVINGS – PROPOSED SAVINGS SCENARIO						
Offering	EM&V	Program Costs	Total	Participation	Gross Energy Savings (MWh)	Gross Demand Savings (MW)
Small Commercial Solutions	\$123,373	\$2,958,580	\$3,081,952	826	9,184	0.39
Large C&I Solutions	\$269,455	\$6,461,750	\$6,731,205	119	29,317	2.04
Schools & Universities	\$68,731	\$1,648,217	\$1,716,948	33	5,648	0.21
CoolSavers Tune-up	\$41,874	\$1,004,175	\$1,046,049	794	4,817	1.49
Home Performance with Energy Star (“HPwES”)	\$143,078	\$3,431,117	\$3,574,194	1,934	5,314	2.13
Income Qualified Weatherization	\$205,578	\$4,929,931	\$5,135,509	1,597	7,063	0.05
Neighborhood-Based Delivery Pilot	\$174,289	\$4,179,584	\$4,353,873	1,230	5,440	0.04
Multifamily Solutions	\$70,846	\$1,698,936	\$1,769,782	2,320	4,531	0.04
Multifamily Solutions Income Qualified	\$61,272	\$1,469,348	\$1,530,620	2,234	3,786	0.05
Residential Marketplace and Appliances	\$39,382	\$944,411	\$983,793	3,102	1,541	0.01
A/C Solutions	\$59,734	\$1,432,464	\$1,492,198	1,670	3,473	2.33
A/C Solutions Income Qualified	\$39,309	\$942,656	\$981,965	1,560	3,178	2.17
Residential HVAC Midstream	\$65,528	\$1,571,409	\$1,636,937	4,394	2,047	0.00
School Kits, Education and Community Outreach	\$8,040	\$376,094	\$384,134	4,100	523	0.00
TOTAL	\$1,370,486	\$33,048,673	\$34,419,160	25,914	85,861	10.95



Implementation Plan NOLA Wise Schoolkits & Outreach Program

Proposal To: | Entergy New Orleans
June 16, 2025

Submitted By: | The National Theatre for Children (NTC)
7003 West Lake Street, Suite 200
Minneapolis, MN 55426

Contact: | Nikki Swoboda
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PROGRAM OBJECTIVE

The NOLA Wise Schoolkits and Outreach Program discussed in this implementation plan will have a term beginning on January 1, 2026 and continuing through December 31, 2028. The term coincides with Program Years 16-18 of the Council of the City of New Orleans's (Council) Energy Smart DSM program. The objective of the program is to secure a total of **523,013 kWh** saved annually of residential energy and 1,569,039 kWh savings over the term of the program. The National Theatre for Children (NTC), in coordination with Entergy New Orleans (ENO), will recruit, enroll, deliver energy efficiency curriculum and disperse schoolkits to 4,100 students each year and secure installation to ENO residences to promote behavior change and create lifelong energy-smart ENO customers.



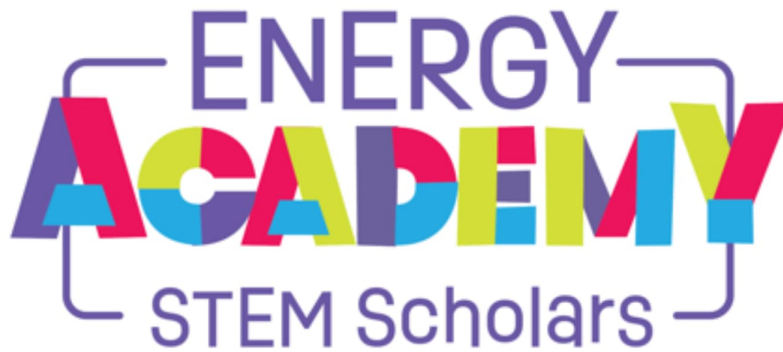
IMPLEMENTATION PROCESS

This document summarizes the implementation plan and proposed budget for the NOLA Wise Schoolkits & Outreach Program. It includes the program's outreach, school enrollment and customer journey, distribution of individual energy efficiency kits to enrolled schools, teacher recruitment and subsequent energy curriculum training, activation of parents in enrolled schools, quality assurance and quality control (QA/QC), and data collection/management procedures of the Schoolkits & Outreach Program.

PROGRAM DELIVERABLES

Under the umbrella program name, *Energy Academy*, NTC will work with ENO to customize the following deliverables to provide a comprehensive energy efficiency curriculum to enrolled schools in the NOLA Wise Schoolkits program:

- **Live Events in Schools** – Full school educational assemblies will align with national and state education standards for science, math and English language arts and can integrate with ENO's existing marketing, CSR, PR and community outreach initiatives. Parent-connect events will also be offered. *NTC will enroll 30-40 elementary and middle schools on behalf of ENO.*
- **Bilingual Print Materials** – English/Spanish. The package will include primary workbooks with activities for grades 2 and 5 and parent-student handbooks for grade 8.
- **Standards-Aligned Energy Education** – NTC will provide ENO-branded e-learning package to enrolled schools and their educators with digital games and activities like e-books, graphic novels, lessons and assessments.
- **Take-Home Energy Saving Kits** – NTC will partner with Greenlite USA to drop ship 4,100 energy-saving kits to 30-40 elementary and middle schools (approximately 30-40 total participating schools annually). These kits will be delivered to 2nd, 5th and 8th grade classrooms, providing ENO with approximately **523,013 kWh** of energy savings annually.



OUTREACH & RECRUITMENT

NTC will work with designated ENO Program Managers to identify, recruit and enroll schools and educators in the NOLA Wise Schoolkits program. NTC requests the following documentation from ENO to assist in recruitment:

- Zip codes of eligible schools
- Defined goals for low-income and historically underserved schools
- List of priority schools (if applicable)
- Current/recent participation in NOLA Wise Schoolkits program

NTC will work with ENO to identify (utilizing above information) and target school community outreach. NTC will attend any regular meetings or calls Program Managers may have with their stakeholders to assist in verifying eligibility and interest in the program.

NTC will position the NOLA Wise Schoolkits program as an easy incorporation for educators by centering outreach and recruitment around the program's educational concepts and how readily teachers can use it in their classrooms. Participation in the program will not only educate students and improve their energy habits, but it will also create a memorable and thorough educational experience in the classroom and make a lasting impact on the homes of the students by providing free energy-saving measures for installation and immediate use via the take-home schoolkit. By prioritizing teacher processes and working to fit in their schedules, we will remove barriers to full adoption of the program.

Primary outreach methods: NTC will develop and deliver ENO-approved marketing drip campaigns advertising the program to school educators and administrators, personal email campaigns from School Communication representatives to teachers, an outbound calling campaign from the NTC call center to main office administrators in each school, an ENO-branded schoolkit program website, direct mail, social media posts and press releases.

Campaigns and priority contacts: The outreach campaign begins with NTC School Communications representatives scheduling the live theatrical events. Priority of outreach recipients is determined by the functional roles served within schools, including administrators, educators, media specialists, librarians, parent groups, etc. Targeted messaging is delivered to each group. NTC conducts outreach in three waves per priority group:

1. School Administrators – Necessary for enrolling full schools and multiple grade levels, this priority group drives opt-in for schools where multiple grades are eligible for schoolkits (grades 2, 5 and 8).

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2. **Teachers** – Crucial to spreading awareness of the program and implementing the curriculum, teachers hold the highest influence in encouraging installation of measures at the students' homes and returning verification surveys. Additionally, they are eligible to enroll in teacher training for ENO and can be champions in gaining full school enrollment for live events and kit delivery.
3. **Stakeholders** – Including PTO, school specialists, administrative support staff and additional parent engagement contacts, this group is recruited to support the parent-connect event and support residential installation of take-home schoolkits.

SCHOOL ENROLLMENT

Educators at schools who have expressed interest in the program will be scheduled for the live tour and then enter the School Customer Journey:

- ⇒ **Verification:** Scheduling will occur via NTC's online booking portal and/or with an NTC School Communications representative. Every booking is verified by a coordinator who confirms the number of students/kits in the 2nd, 5th and 8th grade of that school, along with shipping information and primary contact. NTC will then work with the kit vendor to initiate the distribution process.
- ⇒ **Educational Materials Arrive:** After verification, supplemental materials (student playbooks or student-parent handbooks) are shipped and the digital curriculum (teacher and student toolkit) is loaded onto the web platform.
- ⇒ **Communication with Engaged Schools:** An email alert campaign will be triggered when a school booking is verified that systematically notifies school contacts when their materials have shipped, how their e-learning package can be accessed, when their show is coming up, how to use the kit and how to communicate with parents about the kit.
- ⇒ **Energy Kits Arrive:** Educators will distribute the kits to each of their students to use in their homes with family members. The educational program and e-learning package encourage and guide the installation and usage of the energy efficiency measures in ENO residential customer households.
- ⇒ **Live Event:** On the day of the educational event, students attend the *Energy Academy* live theatrical assembly, serving as a kick-off for energy education in school and inspiring students to take kits home and install measures immediately.
- ⇒ **Post-Event Engagement:** Another email alert system is triggered, supporting teachers as they advocate for their students' families to install kit measures. The emails also include prepared social media images and language for schools to use in promoting kits and the completion of parent and teacher evaluations. This step is a priority in collecting family installation surveys, gaining teacher surveys, and ensuring a high ratio of teachers and students fully adopt the behavior change.

ENERGY KIT ASSEMBLY & DISTRIBUTION

NTC will work closely with Greenlite USA to ensure consistent, reliable delivery of schoolkits to enrolled schools. In 2025, Greenlite is under contract with 150+ utilities nationwide, including all Exelon group utilities, delivering energy efficiency programs.

Greenlite is a prime manufacturer of energy efficiency products for the Utility-Funded Energy Efficiency industry including ENERGY STAR LED Bulbs and Fixtures, Water Saving Products, Entergy New Orleans

Weatherization Products, Smart Thermostats, Smart Home Products, and much more. Greenlite's core go-to-market strategy leverages Utility Energy-Efficiency Incentives to service the Residential Market through a variety of Utility Program Channels such as Upstream and Mid-Stream Programs, Energy Efficiency Kit Programs, Food Bank Programs, Direct Install Programs, Multi-Family Programs, Emerging Technology Programs, etc. In 2024, Greenlite is currently under contract with 150+ utilities nationwide, including ENO. Greenlite has tremendous experience in designing goal-conquering ENERGY STAR programs, navigating real-7 @The National Theatre for Children, 2025 | Confidential Entergy New Orleans, LLC Energy Efficiency and Demand Response Programs world challenges, and problem-solving effectively to allow for seamless program execution that is industry-leading.

QUALITY ASSURANCE & QUALITY CONTROL (QA/QC)

NTC will utilize a variation of methods to assure consistency at scale and quality throughout each touchpoint for program participants and implementation partners.

Establishing consistency of messaging and experiential standards is part of the auditioning, hiring and on-boarding process for NTC touring staff. NTC auditions professional actor-educators, and they will be cast based on teaching artist experience, consistent actor presence and proximity to the ENO service territory. They will be brought to NTC's home offices in Minneapolis to be on-boarded to the ENO program as a whole, as well as to the live event they will facilitate across 34 schools. Touring *Energy Academy* actor-educators will be paired with the Director of School Success who confirms enrolled schools. While the tour is active for the live events, the Director of School Success serves as a daily check-in and touchpoint for the actor-educators and school contacts to confirm no missed connections, miscommunications or negative user experience in the implementation of the live event itself at each school.

On the backend of the actor-educator QA/QC, the Tour Director will facilitate a daily evaluation to the actor-educators of how each live event went. This allows NTC to identify any issues with the production itself, which could include rental car or lodging issues, problems with sets, props and costumes, tour logistics such as drive time between schools, or issues between tour partners. This will allow for expedience in any situations that require a level set.

Through real-time evaluation processes, all enrolled schools will be solicited for feedback from teachers through digital surveys deployed immediately by an email alert system after schools receive both the live event and take-home kits. The online evaluations will provide teacher ratings on the value of the educational materials, the program's impact on student learning, the professionalism of NTC actor-educators, the likeliness of teachers' interest in future programs, which elements of the program they interacted with, how active classroom parents were in the kit distribution and what students liked best about the program. Because these evaluations are completed soon after each live event, adjustments to the program can be made should we recognize any issues raised by educators.

NTC encourages ENO program managers to visit schools during their *Energy Academy* live event and see the program for themselves. Feedback from these representatives is welcomed as NTC consistently works to maintain and improve programming. Tour schedules will be available online for client review. NTC provides regular updates on tour status, and all tour-related metrics are provided in a final report at the end of each tour.

NTC has identified six key components for successful educational programming. The Key Performance Indicators (KPIs) are:

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- 1) **Educational Value** – Measured through teacher and student surveys
- 2) **Consistency at Scale** – Bringing ENO's educational messaging to the largest possible audience while retaining quality
- 3) **Cost per Resident** – Calculated by program expense and quantity of impacted students, parents and educators
- 4) **Measurable Usage** – Quantified by teacher and student surveys
- 5) **Parental Activation** – Gathered by installation survey of kit measures and qualitative assessment of parent-connect event
- 6) **Public Relations Value** – Measured by press hits and social media mentions

The measurement of each KPI is built into regular assessment as part of the QA/QC process.

DATA MANAGEMENT & REPORTING

NTC will work with ENO and Greenlite USA to develop a set of data fields that are captured during enrollment, kit installation and after each live event.

NTC utilizes Salesforce as a CRM and database. Program data will be recorded by NTC and communicated to ENO in a mutually agreed upon format. NTC processes will integrate with ENO's Demand Management Tracking System.

All reporting requirements and formats will be discussed with ENO during program development discussions.

Reports will include:

- Number of schools, students and educators who have participated in programming MWh savings achieved or forecasted
- MW savings achieved or forecasted
- Variance explanations between savings achieved vs forecasted
- Actuals vs forecasted budget
- Milestone targets achieved with data
- Discussions of programming status and any changes to programming
- Upcoming milestone targets with data

NTC will work closely with Greenlite USA to ensure consistent, reliable delivery of school EE kits to enrolled schools. The partnership with Greenlite USA is closely monitored through weekly meetings of program managers and their staff on every detail of the program.

TEACHER EVALUATIONS AND PARTICIPANT HOME ENERGY SURVEYS

All participating teachers that receive kits to distribute to their students also receive Home Energy Surveys to hand out alongside them. These surveys are "assigned" as homework for the students when they take the kits home. The surveys cover topics that support EM&V's work by asking each participant how they heat and cool their home specifically, for instance. They also go measure by measure to ask about installation and ask qualitative questions about the kit and Energy Smart programs. Students then return their completed survey to their teacher at school. When the teacher gathers at least 50% of their classroom's completed surveys, the teacher returns the surveys to NTC in a branded, pre-paid envelope. The teacher then completes another teacher survey and receives a \$50 mini-grant. Continuing to center teachers as the champion of the program has been far more successful in survey completion and incentivizing those teachers is important to reach metrics.

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NTC may consult a third-party evaluator (TPE) to determine the success of a program without bias. We will determine one internal point of contact for the TPE to guarantee efficacy and transparency in each step. NTC will provide ENO raw quantitative and qualitative data in comprehensive reports delivered at a mutually agreed upon frequency, encourage the TPE to attend educational events and cultivate communication that is clear, honest and professional.

Through real-time evaluation processes, all enrolled schools will be solicited for feedback from teachers through digital surveys deployed immediately by an email alert system after schools receive both the video or live performance event and take-home energy efficiency kits.

The online evaluations will provide teacher ratings on:

- The value of educational materials
- Program's impact on student learning
- Professionalism of NTC
- Likelihood of teachers' interest in future programs
- Program elements they interacted with
- How active students' parents were in the kit distribution
- What students liked best about the program

By completing these evaluations soon after each engagement event, adjustments to the program can be made should NTC recognize any issues raised by educators.

NTC encourages ENO program managers to visit schools during program delivery and see the program for themselves. Feedback from these representatives is welcomed as NTC consistently works to maintain and improve programming. School participation schedules will be available online for client review. NTC provides regular updates on school program status, and metrics are provided in a final report at the end of each implementation period.

NOLA WISE SCHOOLKITS BUDGET & TOTAL RESOURCE COST (TRC)

NTC's NOLA Wise Schoolkits Program budget is below. This includes line items for take-home energy kits, live event performance development, outreach and marketing, teacher recruitment and webinar training, the e-learning package with custom games and activities, the scaffolded education curriculum, bilingual printed materials, program website and verification of energy-saving measure installation.

Budget is based on an annual savings of **523,013 kWh** with 30-40 schools participating and 4,100 energy kits distributed to students each program year.

	PY16	PY17	PY28
NOLA Wise Schoolkits & Outreach Program Budget	\$ 191,634	\$ 191,634	\$ 191,634

Detailed budget by line item listed below:

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Development, Marketing and Deliverable for <i>Energy Academy: STEM Scholars</i>	Per school	Total Annual Expense	Program Cost %
Grade K-8 program marketing, outreach, activation, scheduling which includes School Outreach department time and labor (lead representatives and call center for 23 schools annually); R&D for each marketing material for deliverables; Production and delivery of flyers, emails and other communications; post-booking verification with educators and/or administrators	\$ 245	\$ 8,036	4.2%
Grade K-5 live program custom development, scripts, build of technical elements and rehearsal	\$ 105	\$ 3,444	1.8%
Grade 8 live program custom development, scripts, build of technical elements and rehearsal	\$ 105	\$ 3,444	1.8%
Grade K-8 live tour (performances, travel, lodging, insurance, talent)	\$ 585	\$ 19,188	10.0%
Website design, digital engagement reports, customization for ADA compliance and digital BRC	\$ 55	\$ 1,804	0.9%
Bilingual curriculum development (writing, research, art design)	\$ 65	\$ 2,132	1.1%
Digital Teacher Toolkit	\$ 35	\$ 1,148	0.6%
Digital student e-learning package	\$ 30	\$ 984	0.5%
Program Management: Dedicated Client Success, reporting, data gathering, single point of contact, data verification	\$ 145	\$ 4,756	2.5%
Printed student workbooks and parent-teacher handbooks (Universal Printing)	\$ 425	\$ 13,940	7.3%
Shipping (Universal Printing)	\$ 45	\$ 1,476	0.8%
Participant survey return incentives	\$ 165	\$ 5,412	2.8%
Kit measures and delivery (Greenlite USA)	\$ 3,838	\$ 125,870	65.7%
TOTALS	\$ 5,843	\$ 191,634	100%
		Local spend	20.9%



Entergy New Orleans - Energy Efficiency and Demand Response Implementation Plan for New Orleans City Council

June 2025

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Executive Summary

Bidgely has proposed to serve as the Third Party Administrator (TPA) for Entergy New Orleans' (ENO) Energy Smart DSM Programs RFP for program years 16-18 (2026-2028).

Bidgely offers a next-generation Home Energy Report (HER) solution powered by AI-driven appliance disaggregation. This technology enables us to provide hyper-personalized insights that motivate customer behavioral changes, reduce peak demand, and foster sustained energy savings. As a leader in disaggregation technology, Bidgely's HER solution has been implemented successfully across numerous large utilities, benefiting millions of customers with AI-enhanced insights and is uniquely equipped to meet both the immediate and future needs of ENO.

This proposal is being submitted for approval by the New Orleans City Council, and outlines Bidgely's qualifications, program design, and other pertinent details related to the program's implementation for the Council's review. The projected annual savings modeled for this program are as follows:

Annual Summary			
	2026	2027	2028
Estimated Energy Savings (MWh) - Gross	13,048	13,041	11,997

1. Qualifications and Experience

Bidgely stands out as the best choice to deliver a customer-centric behavioral energy efficiency solution for ENO. We have worked with over 45 utilities worldwide, ingesting over 38M meters worth of user data, and providing over 1.5 TWh of total energy savings. We are a recognized leader in the industry, with an increasing number of utilities choosing our solution, as demonstrated by the following recent accolades:

In 2024 alone, Bidgely received four prestigious awards:

- 2024 AESP Energy Awards, Innovation in Technology
- 2024 Fast Company's World's Most Innovative Companies, Top 10 in Applied AI
- Top Product of the Year by Environment+Energy Leader
- 2024 PLMA Technology Pioneer Award (Winner: Bidgely and Avista Utilities)

In previous years, we've also earned recognition such as:

- 2022 Best Practices Award, Smart Energy Consumer Collaborative (SECC) for Rocky Mountain Power's Bidgely-enabled SMB business energy reports and engagement program
- 2023 Best Practices Award, SECC for Avangrid's United Illuminating Bidgely-enabled Electric Vehicle Managed Charging program
- 2021 and 2022 finalist in the S&P Platts Global Energy Awards 'Grid Edge'
- Inclusion in the Inc. 5000 list, ranking among the fastest-growing private companies in the nation

A Leader In the Market - Bidgely has consistently been recognized as a market leader. In the past three years, Guidehouse Insights named Bidgely a "Leader" in:

- 2025 Leaderboard: Home Energy Management Providers
- 2023 Leaderboard: Customer Engagement and Experience Analytics
- 2021 Leaderboard: Home Energy Management Providers
- 2021 Leaderboard: Smart Meter Analytics and AI Vendors for DER Integration

Bidgely's disaggregation capabilities have also been highlighted in Guidehouse Insights' 2022-Q3 report, where we were named among the "next-generation smart meter analytics providers." Similarly, IDC's 2021 MarketScape named Bidgely a "Leader" in Worldwide Digital Customer Engagement Solutions for Utilities, recognizing our strength in meter data disaggregation for delivering highly personalized customer engagement.

Vendor of Choice for New and Expanding Programs: Bidgely is the fastest-growing company in the Home Energy Management, Customer Experience, and Meter Analytics sectors. Utilities of similar size and reputation to ENO trust us to extract valuable insights from their data and create a hyper-personalized experience for their customers. Utilities choose Bidgely over competitors for our flexibility and the enhanced customer experience we deliver before, during, and after the transition to AMI.

1.1. Energy Efficiency Program Performance Highlights

Bidgely's solution is proven at scale at many large utilities, providing over 4.1 million customers with HERs through 20 current behavioral engagements. **Results from programs at utilities of a similar scale to ENO are highlighted below.**

Utility	Program Launch	Program Detail	Results
PSEG-LI (270K) AMI	2024	→ Digital HERs, Paper HERs for 650K+ electric users → Replaced Uplight	→ Results pending
Tucson Electric Power	2023	→ Digital HERs, Paper HERs for 130K+ electric users	→ 10% click rate in the last nine months → 85% program like rate

Utility	Program Launch	Program Detail	Results
(140K) AMI			→ 2+ GWh gross savings to date
Tacoma Public Utilities (100K) AMI	2023	→ Digital HERs, Paper HERs for 55K+ electric users	→ 2.8 GWh gross savings to date → 150% of planned gross savings achieved in 2023 → 56% average open rate → 6.5% average click rate
San Diego Gas & Electric (3.7MM) AMI	2023	→ Digital HERs, paper HERs, and Customer Web for ~950K customers. → Took over from Oracle, where solar and EVs were not addressed in incumbent treatment	→ 16 MWh gross savings to date → 700K Therms gross savings to date → ~200K customers in solar treatment → 2023 Program Targets: 27.8 GWh, 6 MW coincident demand reduction, 338K Therms.
Dominion Energy Virginia (2.7MM) NSM & AMI	2021	→ Digital HERs, Paper HERs for 260,000, and Customer Web for ~750,000 customers across Virginia	→ Chosen as the first-ever vendor to run a HER program for DEVA → 15.1 GWh gross savings to date → Average qualitative feedback of ~97% positive → Average email click rate of 9% → Evaluation pending
Public Service New Mexico (525k) NSM	2021	→ Digital HERs, Paper HERs for 220,000 customers, and Customer Web for 525,000 customers	→ 12 GWh gross savings achieved to date → Average historical like rate of ~90%
Orlando Utility Commission (250k) AMI	2021	→ Digital HERs, Paper HERs for 90,000 water, electric, and dual fuel water/electric users	→ 4.8 GWh and 78K gallons gross savings to date → 2.38% saved in 2022 for water waves → 1M+ emails sent → Average email open rate of 46% & average email click rate of 5%
NV Energy (1.3M) AMI	2019	→ Digital (~65%) HERs, paper HERs, and Customer Web for ~260,000 customers across Nevada → Took over from Uplight	→ 51+ GWh gross savings to date → 13 MW demand savings in 2019/20 → 50% open rates for digital HER → 3.8% EE program savings uplift → Evaluated by ADM

Utility	Program Launch	Program Detail	Results
Rocky Mountain Power (1.1M) NSM	2018	→ Digital HERs to 1.1 Mil, → Paper HERs to 78,000 → Customer Web for ~1.1 Mil customers → SMB CSAT Waves → Across Utah, Idaho and Wyoming → Replaced Oracle	→ 385 GWh in gross savings to date; → Average 1.35% savings in 2023 ¹ → 8.2% EE Program savings uplift → 6% EE Program participation uplift → Evaluated by CADMUS and ADM
Pacific Power (750k) NSM & AMI	2018	→ Digital HERs, paper HERs, and Customer Web for ~34,000 customers in Washington State. Expanded to 96,000 customers in Oregon and CA. → LMI and Indigenous waves in OR and CA → SMB CSAT waves in WA and OR → Customer Web for ~750K customers → Replaced Oracle	→ 33 GWh in gross savings to date → 40% cost reduction → 2.8% EE Program savings uplift → 85% Historical Like Rate → Evaluated by CADMUS

2. Program Design Approach and Strategy

2.1. Program Design

2.1.1. Program Design Methodology

Bidgely will build the program design at the start of the engagement, working with both ENO and the EM&V stakeholders to obtain feedback and make any changes needed to the design. We observe the following broad practices:

- Collaboratively identify strategic goals of the program and design
- Obtain the latest set of treatment and control group customers
- Determine the number of treatment group users required based on savings targets
- Determine if there are enough customers to meet the savings targets across the program period and if not, discuss strategies for a refill
- Build contingencies to allow for drop-outs from either treatment or control groups while meeting the savings targets

To arrive at the treatment and control groups, we typically perform the following screens:

- Users with an average bill cycle length between 10-90 days
- Users with a single valid residential address

¹ Deemed savings based on CADMUS defined methodology

- Users with consumption in the outlier range

Next, we select the overall group of users for the HER program, to maximize customer access, before randomizing the assignment of customers to treatment and control groups. Finally, we perform a statistical equivalence check between treatment and control groups and ensure that the projected savings will meet program goals.

2.1.2. Program Design Forecast

Bidgely's proposed program design is based on our 7+ years of experience implementing similar behavioral programs, and assumptions pulled from the following sources:

- Guidehouse 2024 DSM Potential Study
- Revised Energy Smart Program Year 15 Implementation Plan
- 2024 Triennial Integrated Resource Plan Filing, specifically appendix G to identify savings targets
- Historical Energy Smart Annual Reports

Using the data available, we took a **conservative approach** to estimating savings potential, basing expected performance on a combination of the potential study's findings, historical cohort savings, and similar Bidgely programs. As we refine the model with actual consumption data, we believe there is potential for further improvements.

We value ENO's energy efficiency expertise, and as we assume the administration of the Behavioral Program, we propose maintaining the functional design of your existing cohort to minimize disruption. Bidgely's program design prioritizes building enhancements on top of your existing program foundation to maximize savings potential while remaining as cost-effective as possible:

- We will continue to treat legacy customers across paper and digital waves.
- We will add a new wave with remaining users to augment the size of the current Behavioral Program.
- Optimizing channel & customer selection for propensity to save is a key part of our differentiated capability from other vendors who approach programs without depth.

4. Project Implementation

4.1. Launch Strategy & Plan

4.1.1. Launch Strategy

Bidgely's solution is a low-risk, turnkey Software-as-a-Service (SaaS) platform that allows for rapid initial implementation and subsequent rollout of new features and capabilities over time. This allows us to be agile, responding quickly to utility feedback and consumer needs, and flexible, integrating seamlessly with third-party systems. Our proven technology stack enables

Bidgely to cater to a large and growing user base without the need for code changes. In other words, our system is architected on a massive scale.

Our delivery and data management methodology has five systematic phases to ensure high project quality and timely completion. The approach for this project will include these major phases:

1. **Define** | Project kickoff, confirm the overall project plan, review and sign off on technical specifications, and approve program KPIs.
Deliverables: Project Plan, Product Specifications, and Technical Integration Specifications
2. **Design** | Design and agree on configurable content and white labeling of the product.
Deliverables: Configurable Content Specifications, Recommendations, and Mockups
3. **Integrate** | Complete the technical development, data analysis of the solution, and QA testing to ensure functionality.
Deliverables: ENO-passed data sanity test cases, working sample data files, final historical data, incremental data, UAT data, and solution ready for testing
4. **Test** | Perform User Acceptance Testing (UAT) to confirm solution functions as expected.
Deliverable: Successful User Acceptance Test
5. **Launch** | Finalize all details associated with the launch.
Deliverables: Train-the-Trainer session, Post-Launch Support session, Soft-launch, final live product per scope, and production support processes active

4.1.2. Launch Meetings

During the implementation, Bidgely will provide at least one weekly project meeting and a monthly steering committee meeting during the implementation phase. During the project kickoff and definition phase of the implementation, there will also be additional weekly data & technical integration calls.

4.1.3. Support Needed from ENO During Launch

Bidgely's solution does not require any full-time roles on the part of the utility for the management and maintenance of the solution. The following functions, typical to Bidgely's deployments, generally require only a few hours per month or per quarter:

- **Program Manager:** To review program performance every month
- **Executive Sponsor:** To review program performance during quarterly business reviews
- **Data Integration Support:** Required only if issues arise with the automated production data integration (e.g. delayed data, missing data, etc.)
- **SSO Support:** If single-sign-on is in scope, SSO support would be needed if there is a production issue or there are planned changes to the SSO integration. A technical resource to make SSO changes and/or someone to test the SSO integration may be needed.

- **Content and UX Support:** As Bidgely and the utility decide on configurable content changes (as frequently as quarterly), the utility would need to engage:
 - **Content Reviewers:** Usually from marketing, communications, and/or legal to review any content changes
 - **Translator:** If multi-language support is in scope, someone will need to translate content into multiple languages
 - **Testers:** Usually 1-5 people who will spend anywhere from 2-8 hours per testing cycle to validate planned changes to the product
- **Call Center Support:** To support any customer calls related to the program. In North America, call volume is low at less than 0.5% of customers calling in, so utilities can easily manage these calls with the existing call center team.

4.2. Sub-Contractor

Bidgely will collaborate with an external subcontractor for the printing and mailing of paper HERs. For this program, we are partnering with Advantage Printing.

5. Marketing

5.1. Marketing Strategy

The proposed Behavioral Program is structured as an opt-out initiative, which typically means traditional marketing tactics are not directly applicable. However, Bidgely's Home Energy Reports (HERs) are strategically designed to cross-market other Energy Smart programs by utilizing our AI-driven insights. Our solution delivers hyper-personalized content that adjusts to individual customer segments, informed by detailed appliance usage data gathered through our disaggregation technology and an understanding of each home's specific characteristics.

Leveraging these insights, we can provide each customer with tailored tips and recommendations. This includes promoting relevant programs that ENO is currently offering. For instance, if our data indicates a customer's HVAC usage is unusually high on specific days, we might suggest participation in a smart thermostat program or another similar HVAC-focused initiative that ENO is looking to promote. This approach ensures that marketing efforts are not only personalized but also highly relevant and timely, increasing the likelihood of engagement and participation.

5.2. Marketing Strategy for Different Customer Segments

As an opt-out program, Bidgely's Behavioral Program does not rely on scheduled marketing efforts to generate awareness and demand. However, maximizing savings hinges on the relevance of the messaging in each Home Energy Report (HER) to the individual customer. To achieve this, Bidgely employs a "segment of one" approach, treating each customer as a unique entity. This method ensures that every communication is highly personalized, addressing the specific energy usage patterns and potential savings opportunities for each customer, thereby enhancing the effectiveness of the program.

The Status Quo: Segmentation

The utility industry has traditionally relied on segmentation to deliver relevant messages to customers, utilizing a generic approach that amalgamates various types of loosely connected customer data. This data typically includes demographics, psychographics, real estate specifics, building characteristics, and aggregate behavioral patterns such as whole-home energy usage. Customers are grouped into broad segments based on these data points, with each segment receiving standardized messaging styles. This approach results in thousands of customers being categorized into a limited number of segments, where each segment is treated uniformly, **often overlooking the individual nuances and specific needs of each customer.**

Bidgely's Hyper-Personalization: A "Segment" of One

Bidgely's hyper-personalization is transforming the industry's approach. Our AI-driven insights for each customer go far beyond traditional data sources to include detailed appliance attributes and usage characteristics, digital engagement behaviors, and a multitude of customer attributes, all derived from actual customer behavior. As customers engage with the unique appliances in their homes and with Bidgely's omnichannel solutions, our AI platform incorporates the new data and refines the insights we have for each customer.



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Implementation Plan

Energy Smart

Residential Demand Response

SUBMITTED BY

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ENO Implementation Plan 2026 – 2028

Bring Your Own Thermostat (BYOT) DR

ENO will work with EnergyHub to deploy a Bring Your Own Thermostat (BYOT) demand response (DR) program where residential customers purchase and install qualifying connected thermostats, and voluntarily enroll those devices in ENO's thermostat DR offering. ENO will utilize EnergyHub's DERMS and program services to deploy the BYOT program. EnergyHub's program services include vendor management, marketing coordination, enrollment and DR event support, customer support, and other day-to-day program management activities.

EnergyHub will work to coordinate marketing activities and DR dispatch of the EasyCool BYOT program. EnergyHub will also work with Franklin Energy to enable the pre-enrollment of connected thermostats that are purchased through the Residential Energy Smart Online Marketplace in the EasyCool program.

Marketing and outreach

To drive device recruitment, EnergyHub will leverage a co-branded BYOT DR marketing campaign that includes email, web, and partner in-app marketing. This strategy leverages device manufacturer and service provider partnerships to target potential BYOD program participants. The program will also drive enrollments through additional social and digital marketing channels, as needed, and via pre-enrolled thermostats that are fulfilled through the Online Marketplace mentioned above.

EnergyHub will provide ENO with an EasyCool program microsite to serve as a landing page for customers to learn more about the program. The microsite contains an overview of the program (including eligibility guidelines, incentive criteria, and DR event details), Frequently Asked Questions, and an opportunity to enroll directly in the program through our partner enrollment flows.

Customer Enrollment and Participation

ENO residential customers with working central air conditioning, and a connected thermostat



supported by the EnergyHub DERMS platform can participate in the BYOT DR program. Customers must provide basic information (name, address, email) and accept the program terms and conditions (T&Cs) to apply to the BYOT DR program. The customer T&Cs set forth the program eligibility requirements and other relevant program information.

ENO residential customers that have existing connected thermostats will be directed from outbound marketing to enrollment pages for each device manufacturer where they will provide basic information to apply to the residential BYOT DR program. Customers that do not yet have a connected thermostat will receive marketing directing them to the Energy Smart Online Marketplace.

EnergyHub or ENO will process BYOT DR applications using the EnergyHub DERMS enrollment tool. Once accepted into the program, a \$100 enrollment incentive will be issued via electronic gift card, and residential customers will automatically be available for DR dispatch within the EnergyHub DERMS. Participating customers will experience a temperature adjustment when a DR event is dispatched from the EnergyHub DERMS. Customers will be able to opt out of a DR event at any time, or may un-enroll from the BYOT program, if desired. Enrolled customers will also be issued a \$25 incentive for every DR season they are enrolled in the program.

Data Collection

The EnergyHub DERMS platform collects data through technical integrations with each of its device partners and provides near real-time access to device data such as connectivity status, operating mode, temperature setpoint, indoor/outdoor temperature, and runtime interval data. The EnergyHub DERMS provides self-serve, data analysis features and reports for enrollment, interval reporting, and post-DR event results. On the event analytics dashboard, users can access a complete overview of event metrics in the EnergyHub DERMS interface, including detailed load charts and analyses of the key factors that impacted event success.

Evaluation, Measurement & Verification (EM&V)

EnergyHub's DERMS uses thermostat interval runtime data to perform measurement and verification of performance following load control events. The DERMS generates a DR baseline for each interval of the DR event based on the historical usage of targeted devices. The baseline is compared to actual runtime usage of targeted devices in a given interval to determine event performance. In addition, DERMS provides DR event reports that ENO can



view during and after the completion of a DR event for M&V and analysis. DR event reports (e.g., participation statistics, load and load shed interval data) are available for download from DERMS on demand following the completion of an event and will be provided to the program evaluator.

Passive EV managed charging

EnergyHub will deliver a passive electric vehicle (EV) managed charging solution that encourages customers to shift daily charging behavior to off peak periods. The solution supports enrollment through multiple channels, includes ongoing customer engagement, and captures customer charging data that's used to quantify program impact and incentive eligibility.

Marketing and outreach

EnergyHub's passive managed charging solution recruits and enrolls drivers via EVSE (i.e. EV chargers) or directly via the EV's telematics using a broad array of marketing channels, including OEM-led marketing, ENO-led marketing, and/or social and digital channels. Customers may learn about the program from a variety of sources, but are ultimately directed to EVSE and EV partner-supported enrollment sites where they can enter their information and review and accept program terms and conditions.

After enrollment, customers receive a welcome email communicating program details, including off-peak and on-peak hours and any relevant pricing information (e.g. \$/kWh differences during on and off-peak periods, and program incentive details). EnergyHub sends customers a monthly off-peak savings report via email that details the customer's off-peak charging patterns, incentive eligibility, and recommendations for off-peak charging and increased savings. EnergyHub also sends email communications to customers who have charged on-peak greater than 20% of the time, reminding customers about their off-peak charging and providing tips to charge on-peak less often.

Customer Enrollment and Participation

Customers with a qualifying EVSE or EV will be eligible for the program, with participants eligible for a \$50 enrollment incentive and \$5 monthly participation incentive. Participants will only be eligible for the monthly participation incentive if they plug their vehicles in at least one time per month and >80% of their charging occurs during the off-peak period, with these variables being adjustable by ENO.



EnergyHub or ENO will process program enrollment applications using the EnergyHub DERMS enrollment tool. Once accepted into the program, the enrollment incentive will be issued via electronic gift card, with customers eligible for the monthly participation incentive thereafter. The monthly participation incentives are also fulfilled via electronic gift card, delivered on a quarterly or semi annual basis.

Data Collection

The EnergyHub DERMS collects vehicle charging data via API integrations with EVSE and EV OEM partners. This data is accessible through the platform through a variety of dashboards and reports, including analytics focused on hourly load activity, average and peak load by OEM, load profiles (by hour of day or day of week), and daily charging patterns.

Evaluation, Measurement & Verification (EM&V)

The passive EV managed charging program provides load shifting on a daily basis, as opposed to event-based curtailment on an ad hoc basis. As such, the primary EM&V metric is focused on the percent of charging shifted to off peak periods. Charging data is available for download for internal M&V or for third-party evaluation. EnergyHub will align with ENO on a detailed plan to support M&V programs in accordance with program requirements.

Battery Demand Response

EnergyHub will deliver for ENO a full-scale battery demand response ("DR") program, including available incentives toward the upfront purchase of new Battery Energy Storage Systems ("BESS"), that builds on the current pilot that was launched in 2024. EnergyHub's battery solution includes enrollment via participating battery OEMs, battery curtailment during peak periods (with up to 100 events per year), data and analytics, and upfront and ongoing incentive processing. Providing incentives to defray the cost of a BESS will transform existing behind the meter resources into dispatchable grid assets through ENO's existing Virtual Power Plant ("VPP") operated under the Energy Smart program. Participants will have the ability to choose from several different major BESS manufacturers to qualify for the incentive. In exchange for the upfront incentive, these resources will be automatically enrolled into the Energy Smart demand response program, adding valuable capacity to the existing VPP.



To help facilitate low-to-moderate income participation and support different financing options, ENO intends to make the upfront incentive assignable by the customer to the vendors and contractors selling and installing the battery systems. The assignability of the upfront incentive will reduce upfront cost associated with installing a BESS. ENO and EnergyHub will work together to verify interconnection application compliance, facilitate successful recipient enrollment into the DR program, and process incentive payments.

Marketing and outreach

EnergyHub will work with ENO and participating battery partners to deploy a multi-channel marketing campaign. For customers with existing batteries, EnergyHub is actively working with all integrated battery partners to develop a comprehensive in-app DR experience. Dependent upon partner capabilities, battery partners can send email marketing to installers to disseminate information about the program offer. The program will also support new battery installations, with battery OEMs and developers enrolling customers in the program as part of the purchase process. In addition to these primary channels, customers may learn about the program through a program microsite and/or any incremental marketing campaigns deployed by EnergyHub and ENO.

Customer Enrollment and Participation

Customers with an existing battery will receive program marketing and then apply. This flow includes customer acceptance of program Terms and Conditions, and enrollment via their battery provider. The battery provider will submit enrollment information for display and processing in EnergyHub's platform. Customers purchasing a new battery will follow a similar process, accepting Terms and Conditions and providing enrollment information via the battery provider at the point of sale/installation. ENO or EnergyHub will then process applications using the EnergyHub DERMS enrollment module, similar to the BYOT and EV managed charging programs.

Upon enrollment, customers' batteries will be available for dispatch via the EnergyHub DERMS, and customers will be eligible for program participation incentives. The participation incentive will be \$125/kW, based on the average kW discharged across all events in the DR season. The incentive will be capped at \$600 per customer per year, and fulfilled via check.



Data Collection

The EnergyHub DERMS collects battery interval data via API integrations with battery OEMs and developers. This data is consolidated in a number of analytics dashboards available to ENO for self-serve, on-demand access. The dashboards include a number of aggregate and device-level graphics and reports that provide insights into program performance.

Evaluation, Measurement & Verification (EM&V)

The data analytics and reports mentioned above can be used to inform program EM&V efforts, with the data available to ENO or third-party evaluators. The EnergyHub DERMS provides battery DR event reports that ENO can view during and after the completion of a DR event for M&V and analysis. DR event reports (e.g., participation statistics, load and load shed interval data) are available for download from DERMS on demand following the completion of an event and will be provided to the program evaluator.

The Total Resource Cost ("TRC") score for the 3-year battery program is .6.



Budget and Savings

Program	Program Component	Year 16	Year 17	Year 18
BYOT DR	Program administration (non-incentive)	\$504,500	\$563,600	\$629,200
	Incentives	\$365,000	\$407,500	\$452,500
	BYOT DR Total	\$869,500	\$971,100	\$1,081,700
Passive EV managed charging	Program administration (non-incentive)	\$150,000	\$150,000	\$150,000
	Incentives	\$17,710	\$17,140	\$23,420
	Passive EV managed charging Total	\$167,710	\$167,140	\$173,420
Residential Battery DR	Program administration (non-incentive)	\$231,200	\$324,800	\$423,400
	Incentives	\$2,427,375	\$2,937,375	\$3,447,375
	Residential Battery DR Total	\$2,658,575	\$3,262,175	\$3,870,775
	Grand Total	\$3,695,785	\$4,400,415	\$5,125,895

Year 16			
Program	Program Costs	Participation	Gross Demand Savings (MW)
BYOT DR	\$869,500	10,700	10.70
Passive EV managed charging	\$167,710	161	0.08
Residential Battery DR	\$2,658,575	1,275	6.38
Total	\$3,695,785	12,136	17.16



Year 17			
Program	Program Costs	Participation	Gross Demand Savings (MW)
BYOT DR	\$971,100	12,100	12.10
Passive EV managed charging	\$167,140	229	0.11
Residential Battery DR	\$3,262,175	2,550	12.75
Total	\$4,400,415	14,879	24.96

Year 18			
Program	Program Costs	Participation	Gross Demand Savings (MW)
BYOT DR	\$1,081,700	13,600	13.60
Passive EV managed charging	\$173,420	317	0.16
Residential Battery DR	\$3,870,775	3,825	19.13
Total	\$5,125,895	17,742	32.88



Honeywell

Implementation Plan Large Commercial Demand Response

Implementation Plan To:	Entergy New Orleans 16 June 2025
Submitted By:	Honeywell Smart Energy 208 S Rogers Lane Raleigh, NC 27610-2144
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PROGRAM OBJECTIVE

The Commercial Demand Response (DR) Program discussed in this implementation plan will have a term beginning on January 1, 2026 and continuing through December 31, 2028. The term coincides with Program Years 16-18 of the Council of the City of New Orleans's (Council) Energy Smart DSM program. The objective of the program is to secure a total of 10.5 additional megawatts (MW) of new commercial demand shed over term of the program. Honeywell Smart Energy (HSE), in coordination with Entergy New Orleans (ENO) will recruit, enroll, conduct DR Surveys, and install control equipment at customer sites to provide a turn-key solution for ENO Commercial customers.



IMPLEMENTATION PROCESS

This document summarizes the implementation plan and proposed budget for the Commercial DR Program. It includes the program's outreach, customer DR Survey / enrollment, trade ally recruitment/training, hardware and software, Evaluation, Measurement & Verification ("EM&V"), and data collection/management procedures of DR performance.

OUTREACH / RECRUITMENT

HSE will work with designated commercial ENO Account Managers to identify, recruit, and enroll customers in the Commercial DR program. HSE requests the following documentation from ENO to assist in recruitment:

- Commercial customer list of all accounts that includes:
 - Customer Name and contact information (address, phone, email)
 - Peak demand (kW) and usage (kWh)
 - Current participation in Energy Smart Program(s)
 - Assigned ENO Account Manager (if applicable)

HSE will work with ENO Account Managers to identify (utilizing above information) and target customer outreach. HSE will attend any regular meetings or calls Account Managers may have with their customers to assist in verifying eligibility and interest in the program.

HSE will also implement recruitment incentives for participating contractors and partners who refer eligible customers. Similar referral programs in other markets have proven successful in boosting participating and expanding program reach, and we anticipate this strategy will strengthen local engagement and drive enrollment growth.

CUSTOMER DR SURVEY / ENROLLMENT

Commercial customers who have expressed interest in the program will be scheduled for an initial facility walk through and discussion with HSE and/or ENO representative. If the customer remains interested and the facility walk through determines that facility is likely eligible to participate, then a full DR survey will be scheduled. The DR survey will collect data on facility/customer operations, major energy consuming high demand equipment/appliances, existing building management system (BMS), and electrical meter location. The site data collected for the program will be agreed upon between HSE



and ENO and outlined in the SOW. The site survey will highlight potential measures that can be curtailed to reduce demand within acceptable customer operational constraints.

The DR survey will be sent to customer within 30 days of the site visit. After review and discussion of the survey with customer and if in agreement on proposed shed measures, customer would sign DR Agreement. Agreement is between customer and ENO and indicates how DR events will be dispatched, and how performance payments will be calculated and paid. Performance payments are calculated based on AMI meter data received from ENO. A pulse box will be installed by HSE to log demand data for performance calculations should any major accounts billable customer non have an AMI meter.

TRADE ALLY RECRUITMENT / TRAINING

We understand from our direct experience that recruiting and maintaining a strong and active network of trade allies is the main key to meeting savings and customer satisfaction goals. We have developed a local and diverse network of trade allies that we utilize for ADR project implementation. We will utilize these trade ally partners and continue to recruit and train additional contractors that can help with project implementation and recruiting. Local, existing knowledge of facilities has proven to reduce time and cost of project selection, validation and installation.

All automated solutions for the Commercial DR program will use the appropriate hardware to enable the automated, remote accessible dispatch of load control signals and performance data metrics. Specific load control shed measures are tailored to individual customer facility and their operations. BMS programming changes will be conducted by the customers current BMS provider or by a recruited local subcontractor who is familiar and has the licensing to perform such work for customer.

GATEWAY & SUPPORTING HARDWARE INSTALLATION

Honeywell will utilize the following procedures when installing and commissioning DR hardware and software:

- a) Install gateway in agreed upon location at customer facility. Gateway will be installed in the vicinity of the BMS controller and ENO utility meter.
- b) Ensure gateway is connected to DR software platform.
- c) Site connectivity will be through facility/customer supplied internet connection or via a cellular gateway. Internet connection allows for remote event dispatch, monitoring, and Evaluation, Measurement and Verification (EM&V).
- d) Configure existing facility BMS for agreed upon load shed measures. Programming is typically completed by existing facility BMS contractor or another subcontractor familiar with the system.
- e) Following programming and hardware installation, function testing to include multiple test events will be conducted to verify load shed and installation is functioning as designed.

Following test events, local HSE and subcontractor personnel will confer with customer and ENO to ensure installation and performance has met objectives. Further programming or modifications can be accomplished to ensure all targets are achieved.

Installation will be completed by local HSE personnel or trade ally.



DR DISPATCH, CONTROL & OPTIMIZATION SOFTWARE

Honeywell will be deploying an advanced software platform for dispatch, control, and optimization of all DR resources enrolled in the Program. This software platform, Forge Performance+ for Utilities will be utilized to forecast, dispatch, and conduct performance measurement.

Honeywell will utilize Forge to advance its goals of maximizing customer satisfaction for participants in the Program while simultaneously maximizing reliability of the Program for ENO. Key features of the software platform that Honeywell will provide to ENO include:

- a) Dispatch of DR resources
 - Day-Ahead forward scheduling and fast 10-minute dispatch
 - Events can call for assets to be ramped in/out slowly, curtailed immediately for emergencies, or anything in-between
- a) Constraint based dispatch to ensure customer set limits are never exceeded, thereby reducing participant fatigue and ensuring the flexibility is always available.
- b) Flexible methods and technology to connect to customer assets, supporting dispatch ranging from 100% control by customer to fully automated response
- c) Customer ability to opt out of future or current events regardless of how they are connected/dispatched to/from Forge
- d) Unlimited ways to group customers/assets that allows ENO to call only the assets where they're needed, when they're needed
- e) Two-way feedback loop to monitor and control assets
 - Allows for real-time measurement & verification of customer/asset performance
 - Provides the ability for the platform to constantly re-optimize how much demand is curtailed by each customer as real-time results reveal over or under-performance
- f) Web portal interface available to ENO to view real-time status of assets enrolled in Program
- g) Event participation reports, including usage, participation status, and other relevant data at the individual customer/asset level.
- h) Ability to download data and reports for analysis.

Adaptable to new and changing technologies that can provide flexibility to the program (i.e. batteries, electric vehicles, distributed solar, etc.) as new innovations come to market, allowing ENO to avoid obsolescence

EVALUATION, MEASUREMENT & VERIFICATION (EM&V)

AMI meter data, supplied by ENO via a Secure File Transfer Protocol (SFTP) on a nightly basis, will be utilized by Forge to calculate performance and associated incentive payments. Alternatively, pulse data functionality, via compatible ENO meters, can be installed by HSE to enable real-time demand data transmission to Forge. Both methods are currently in use and have proven reliable.

Forge utilizes an industry standardized approach to baseline customer energy demand and resulting event performance. Performance will be calculated after each event and communicated to ENO and customer. Payments will be sent to customer following completion of each DR season in October and May time frame.



DATA MANAGEMENT & REPORTING

HSE will utilize the follow data fields to verify customer eligibility and track DR performance: Customer name, address, phone and account numbers.

Following ADR gateway installation, the MAC ID, Premise ID, Gateway ID, and corresponding facility address will be recorded and loaded into Forge. Customer data and event performance will be sent to ENO following each event with a consolidated report sent after season end.

COMMERCIAL DR BUDGET & TOTAL RESOURCE COST (TRC)

HSE Commercial DR Program budget is below. This includes line items for hardware, Forge, Command Central, outreach/enrollment, trade ally recruitment/training, and installation and programming of DR hardware and software. Budget is based on a cumulative DR demand shed with 10.5MW of demand shed being new installations over program period. TRC scores vary year to year depending on the acquisition and curtailment strategies. Given this is a mature program we estimate a TRC of 4.63 at the end of year 16 which is the highest added kW. As additional load shed is added the TRC scores go to 3.67 and 3.36 as less load is added in year 17 and 18. The program lifetime TRC is 1.98.

	Year 16	Year 17	Year 18
Combined Implementation + Incentives	\$2,468,760	\$2,980,148	\$3,288,761

Implementation Plan prepared for the Entergy New Orleans



Technical Plan

EM&V Third-Party Evaluator

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1.0 INTRODUCTION

Tetra Tech enthusiastically presents a proposal to Entergy New Orleans, LLC (ENO) to provide evaluation services as a third-party evaluator (TPE). Leveraging established relationships with Entergy Corporation and previous experience evaluating energy efficiency portfolios for Entergy Arkansas, Louisiana, Mississippi, and Texas, Tetra Tech emphasizes our ability to facilitate a seamless transition and provide exemplary services to ENO. With strong project management and partnership capabilities, Tetra Tech also offers value-added evaluation, measurement, and verification (EM&V) services that meet regulatory requirements and support program success, positioning the team as the ideal candidate to serve ENO's needs.

Having successfully delivered the Energy Smart demand-side management offerings for almost 15 years, ENO has significantly impacted energy savings for residential and commercial customers, earning annual recognition as an ENERGY STAR® *Partner of the Year* from 2020 to 2023. However, ENO faces emerging challenges, including distributed energy resources and electric vehicles connecting to its grid, uncertainties about federal funding, cybersecurity concerns, and changing weather and climate patterns affecting energy, demand, and savings. Changing standards around lighting regulations, labor shortages among contractors, and inflationary pressures continue to complicate program planning and implementation across energy efficiency departments. Tetra Tech is experienced in navigating such complexities across Entergy's operating companies and is well-positioned to support ENO in adapting and enhancing its energy efficiency programs amidst these challenges.



*Having worked closely with Entergy Arkansas to evaluate energy burdens among income- and non-income-qualified customers in 2023, **Tetra Tech looks forward to collaborating with ENO to expand the utility's focus on income-qualified customers.** Tetra Tech's data scientists and analysts have developed online tools that map past program participants and income levels to assist clients in identifying clusters of underserved, nonparticipating customers.*

The New Orleans City Council (the Council) enacted ambitious energy and demand savings goals for the 2026–2028 Energy Smart programs and appears likely to continue these goals in future years, requiring significant savings. ENO continues pushing the achievable frontiers in its territory, necessitating innovative approaches and partnerships. Tetra Tech, with its expertise in evaluation, measurement, and verification, is uniquely positioned to support ENO in meeting these challenges, working with selected third-party administrators (TPA) to enhance program offerings, expand capabilities, and ensure accurate, independent reporting to the Council that meets all regulatory requirements.

Tetra Tech is excited to collaborate with Infinity Engineering Consultants, LLC (Infinity Engineering) to enhance the team's energy efficiency evaluation expertise. Infinity Engineering, an active vendor in Entergy's procurement system, offers local engineering resources for on-site inspections and engineering reviews, further strengthening the team's capabilities. We remain committed to fostering partnerships with local and diverse firms, **dedicating a minimum of 21 percent of the contract to our partner**, embodying a shared commitment to equitable practices in our endeavors.



Data integrity and security are paramount for Tetra Tech's evaluation efforts, and we implemented proven processes for the secure transfer and storage of data across Entergy's operating companies. Having completed Entergy's Governance for Understanding and Assessing Risk to Data (GUARD) process, Tetra Tech will renew this governance framework for ENO. Our robust data security protocols are vital when handling Entergy's sensitive data, and we will elaborate on these protocols in our project execution plan to ensure transparency and adherence to best practices throughout the evaluation process.

The programs in Table 1 are categorized into the following sectors: (1) residential, (2) commercial, and (3) outreach, behavioral, and demand response. We commend ENO's plan to select the TPA and TPE before the new program cycle, facilitating an in-depth understanding of TPA offerings before program implementation. We will work collaboratively to finalize ENO's evaluation plan, ensuring consensus and identifying opportunities to integrate EM&V into the program execution where appropriate as soon as possible after contract execution.

Following the initial kick-off of the program cycle, Tetra Tech will engage in annual discussions with ENO and its TPAs to revisit evaluation priorities and EM&V activities, with presentations to the Council and stakeholders to follow. Utilizing the established New Orleans Technical Reference Manual (TRM), we will calculate verified savings through engineering desk reviews, data analysis, surveys, and on-site measurement and verification (M&V), conducting annual impact evaluations for each program. With the successful deployment of ENO's advanced metering infrastructure (AMI), we will collaborate on additional analyses to assess impacts and prioritize updates to the TRM. AMI data will facilitate a census approach to evaluating demand response and behavioral programs, while sampling will be used for most other programs to achieve 90 percent confidence with a ± 10 percent error margin.



A crucial real-time component for the success of impact evaluations is the provision of **proactive, early technical assistance**, particularly for ensuring accurate savings calculations before obtaining evaluation results, which is especially vital for custom projects and emerging technologies. Tetra Tech's experience collaborating with Entergy's operating companies in Arkansas, Louisiana, Mississippi, and Texas has demonstrated that such proactive support can lead to realization rates nearing 100 percent. This approach is essential for helping ENO and its TPAs achieve savings goals, particularly by integrating new measures into the New Orleans TRM.

Guidehouse's 2021 and 2024 DSM Potential Study identified retro-commissioning as having the potential for the most significant savings. As the evaluator in Texas, Tetra Tech reviews recommissioning M&V plans to establish consensus upfront, resulting in the development of a recommissioning protocol and a streamlined M&V methodology tailored for smaller, turn-key projects. These standardized protocols have been incorporated into the Texas TRM to facilitate the implementation of diverse recommissioning initiatives, ultimately broadening customer access to this energy-saving measure.

The 2024 DSM Potential Study also identified high savings potential in operations and maintenance, explicitly noting residential *duct sealing* and *A/C tune-ups*. Tetra Tech will leverage the experience gained from thousands of engineering and desk reviews of *duct sealing* and *A/C tune-ups* in neighboring jurisdictions to ensure these measures deliver the full savings potential to ENO customers. Given the Healthy Homes ordinance in New Orleans, *A/C tune-ups* present a massive opportunity for utility savings.

Demand response programs, which represent a critical tool to reduce grid congestion during periods of peak demand, were also identified as having high potential savings in the 2024 DSM Potential Study. The Tetra Tech team has designed web-based applications that allow utilities to estimate demand savings achieved through load control events, and the team is excited to demonstrate this application to the ENO team. The system enables users to estimate savings when data become available, and the user interface is entirely point-and-click, avoiding the need for programming or coding. ENO's recent expansion of demand response programs and plans for additional load control programs in the new program cycle should bring much-needed relief to Entergy's grid. It is an ideal time in 2026 to continue developing and expanding these programs; capacity constraints appear likely to begin around 2030 across the ENO territory, and demand response programs offer cost-effective options to reduce peak load with minimal disruptions to customers.

Based on the performance of the Energy Smart programs in 2022,¹ we outlined a preliminary sequence of process evaluations for the 2026–2028 program cycle in Table 1.² We will incorporate findings from additional evaluation reports as they become available and plan to finalize prioritization and timing in collaboration with ENO during the project kick-off to ensure maximum value from the research and incorporate ENO's insights.

Tetra Tech will deliver feedback on program performance to ENO through process evaluations of each program at least once during the 2026–2028 program cycle, ensuring compliance with the New Orleans TRM guidelines. We prioritized six programs to receive multiple process evaluations during the cycle based on historical underperformance, high contributions to portfolio savings, or their status as new programs (Behavioral, Code Compliance, Large Commercial & Industrial Solutions, Bring Your Own Thermostat Demand Response, Peak Time Rebates, and Electric Vehicle Managed Charging). Should other programs undergo modifications or face challenges regarding cost-effectiveness, participation, goals, or satisfaction, additional evaluations may be conducted within the three-year cycle.

To enhance efficiency, we aim to conduct process evaluations alongside net-to-gross (NTG) research, leveraging synergies in data collection from participants and market actors. Timely responses to emerging issues and practical evaluation recommendations are essential. Tetra Tech will inform ENO and its TPAs with prompt feedback as evaluation activities conclude through interim reports before the annual assessments. Any program not scheduled for a process evaluation during the 2026 evaluation will receive a full process and NTG analysis in 2027. Using this structure allows ENO and the EM&V team to adapt and identify evaluation priorities for the final year of the cycle.

¹ 2022 evaluations are the most recent reports available publicly.

² Programs in Appendix D, Entergy New Orleans, LLC 2026–2028 Energy Smart Program Descriptions.

Table 1. Summary of Proposed Three-Year Evaluation Plan

Program	2026 EM&V	2027 EM&V	2028 EM&V
Residential			
Home Performance with ENERGY STAR	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ✓ Update NTG ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V
Multifamily Solutions	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ✓ Update NTG
A/C Solutions	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ M&V data review 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Update NTG ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ M&V data review ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ M&V data review

Program	2026 EM&V	2027 EM&V	2028 EM&V
Retail Lighting and Appliances	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ Benchmarking analysis for NTG 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ Update NTG and leakage estimates ✓ Sales data and promotional activities analysis ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ Benchmarking analysis for NTG
Income-Qualified Weatherization	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ✓ Update NTG if required. It is standard industry practice to stipulate low-income programs at 1.0. ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V

Program	2026 EM&V	2027 EM&V	2028 EM&V
Commercial			
Large Commercial & Industrial Solutions	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ✓ Update NTG ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ✓ Update NTG ✓ Participant surveys ✓ Market actor interviews
Small Business Solutions	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ✓ Update NTG ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V

Program	2026 EM&V	2027 EM&V	2028 EM&V
Schools and Universities	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ✓ Update NTG ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V
Code Compliance	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ride-alongs ✓ Update NTG ✓ Participant surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ride-alongs 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ Desk reviews ✓ On-site M&V ride-alongs ✓ Update NTG ✓ Participant surveys Market actor interviews
Outreach, Behavioral, and Demand Response			
NOLA Wise Schoolkits and Outreach	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ School survey review 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ School survey review ✓ Update NTG ✓ Participant teacher surveys ✓ Market actor interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ TRM tracking data verification and review ✓ School survey review

Program	2026 EM&V	2027 EM&V	2028 EM&V
Behavioral	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census billing data analysis ✓ Participant surveys ✓ Assess adjusted net savings to address potential double-counting of savings 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ Census billing data analysis 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census billing data analysis ✓ Participant surveys ✓ Assess adjusted net savings to address potential double-counting of savings
Bring Your Own Thermostat Demand Response	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis ✓ Participant surveys 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis ✓ Participant surveys
Large Commercial & Industrial Demand Response	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis ✓ Participant interviews 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis
Peak Time Rebates	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis ✓ Participant surveys 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis ✓ Participant surveys
Electric Vehicle Managed Charging	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis ✓ Participant surveys 	<ul style="list-style-type: none"> ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis 	<ul style="list-style-type: none"> ✓ Full process evaluation ✓ Program staff interviews ✓ Material review ✓ Census meter data analysis ✓ Participant surveys

2.0 PROJECT EXECUTION PLAN

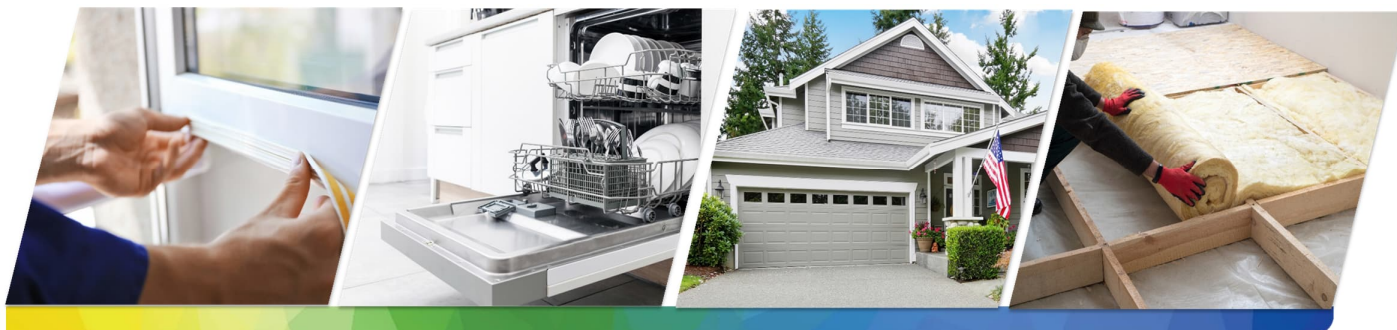
2.1 OVERVIEW

Our EM&V project management plan focuses on delivering timely and high-quality evaluations that accurately verify net savings before annual reporting. To facilitate effective collaboration, we have integrated review discussions with Entergy New Orleans (ENO) and its third-party administrators (TPA) into our timeline, ensuring that feedback is incorporated before the final report is submitted to the New Orleans City Council (the Council). This proactive approach aims to foster practical recommendations for continuously enhancing program effectiveness.

The energy and demand savings estimates for New Orleans will be derived from the Technical Reference Manual (TRM), which includes reviews of deemed savings, engineering desk assessments, on-site measurements, and meter data analysis, ensuring compliance with TRM algorithms through annual tracking system evaluations. A selection of sites will undergo detailed desk reviews, and a nested sample will receive on-site measurement and verification (M&V) conducted by Tetra Tech's engineers alongside local partners using the International Performance Measurement and Verification Protocol (IPMVP) standards. These evaluations aim for a 90 percent confidence level with a ± 10 percent error margin and will encompass a census of participants for specific programs.

Following the New Orleans TRM guidance, a comprehensive evaluation of processes and updates to NTG ratios will occur at least once during the 2026–2028 cycle for each program, utilizing participant surveys and interviews with market actors to gather necessary data. The timing of interviews presents a challenge for accurately estimating free-ridership and spillover effects; best practices recommend conducting free-ridership studies *shortly after* program participation to mitigate recall bias, while spillover estimates should be conducted *later* to capture the impact of efficient measure installations outside the program.

To enhance the effectiveness of evaluation, measurement, and verification (EM&V) as a management tool, we will strategically schedule research efforts to maximize relevance for ENO and their TPAs. Survey and NTG results deliver ENO and program implementers with direct feedback from participating customers, while process evaluations—including reviews of program logic models, targeted marketing efforts, and equity—provide actionable information. The results of these process activities will guide additional research efforts over the years without full process evaluations, ensuring continuous improvement and responsiveness to ENO's evolving needs.



Subsequent sections detail the individual tasks the team will undertake in support of ENO's EM&V:



2.2 STRATEGIC EVALUATION PLANNING

Many of ENO's Energy Smart programs have comparable counterparts in Arkansas, Louisiana, Mississippi, and Texas. Having evaluated these programs across Entergy territories for more than ten years, the Tetra Tech team brings unique insights and understanding of ENO's programs. Tetra Tech's work across Entergy's operating companies will enable a seamless transition to a new evaluator, and the Tetra Tech team plans to leverage findings and evaluation results from neighboring operating companies to ensure an effective start to the 2026–2028 cycle.

In 2026, ENO will initiate a new cycle of EM&V to align with an updated portfolio, necessitating a comprehensive assessment of past evaluation practices and a clear understanding of current priorities. The initial step of the evaluation process will be to understand the EM&V needs of the ENO team, including a review of past evaluation methods to determine areas for improvement.

The EM&V process will begin with a project kick-off meeting and detailed interviews with program design and delivery teams to identify strengths and areas for improvement. Utilizing the New Orleans TRM's established evaluation framework, the focus will be on maximizing the value of evaluation research to enhance program design and effectiveness amid increasing savings objectives. Tetra Tech will leverage a strategic resource allocation approach that considers various criteria, including program savings potential, maturity, and cost-effectiveness, ensuring that EM&V is a vital management tool for ENO and its TPAs.



Integrating quality, transparency, and clear communication throughout the evaluation process will be key to achieving strategic planning goals.

2.3 DEVELOPING AN EVALUATION PLAN

The Tetra Tech team's annual evaluation plans are designed to enhance evaluation methodologies' quality and user acceptance by identifying target audiences' specific priorities and needs, which helps in resource allocation. These plans confront the challenges of achieving precision, accuracy, and minimizing bias within budget and data availability constraints while also reflecting the necessary trade-offs evaluators must consider to enhance impact estimates across various levels. Statistical precision largely hinges on sample size and representativeness, whereas bias arises from systematic errors, including issues in sample design, measurement inaccuracies, self-selection biases, and modeling errors. Assessing these competing factors requires an experienced team of evaluators, including engineers, social scientists, and data scientists, to ensure an ideal balance.

The kick-off meeting and interviews begin the planning process, where ENO, TPAs, and the EM&V team converge to discuss evaluation areas and program needs and address concerns. Tetra Tech will collaborate with ENO to ensure all key parties are included during strategizing to prioritize programs, issues, and activities to be evaluated, providing a collaborative and practical approach from the outset. Examples of portfolio-related topics may include:

- assessing synergies and interdependencies among programs,
- identifying common performance metrics and evaluation methodologies,
- evaluating resource allocation and efficiency across the portfolio,
- ensuring alignment with overarching organizational goals, and
- addressing stakeholder engagement strategies to enhance program impact and sustainability.

Additionally, plans should consider potential challenges and risks that could affect multiple programs and propose strategies for mitigation.

***Our evaluation plans are adaptable** and will evolve based on guidance from ENO, the Council, relevant stakeholders, and program outcomes. Acknowledging that these plans are living documents, we commit to updating them at least annually and collaborating closely with ENO in each iteration to ensure they effectively address current evaluation needs.*

2.4 ESTABLISHING M&V AND DUE DILIGENCE PROCEDURES FOR IMPLEMENTERS

We will review TPA quality assurance/quality control (QA/QC) activities, compare them to industry-standard practices, and provide recommendations. Based on our findings and recommendations, for most programs, we will conduct on-site M&V of a sample of projects that will provide both program implementation feedback and essential results for the evaluation. We will discuss a strategy with ENO that we have used effectively for other Entergy operating companies to conduct a portion of the evaluation on-sites as ride-alongs with TPA QA/QC visits. This approach minimizes interruptions to the customer while allowing Tetra Tech to collect independent M&V information and observe TPA QA/QC practices.

*Engineers at Tetra Tech and Infinity Engineering have experience with various monitoring approaches and an extensive inventory of monitoring equipment available during this project. With experienced local resources and the proper tools, we can provide **cost-efficient field monitoring** for this evaluation, leveraging our local on-site M&V infrastructure to support ongoing QA/QC and EM&V activities.*

2.5 REVIEWING TRACKING SYSTEMS AND MAINTAIN PROGRAM COMMUNICATIONS

We will review ENO's tracking systems and maintain communication throughout the evaluation cycle. More details on each of these important components are described below.

2.5.1 Review Tracking System

Our evaluation team will conduct an interim tracking system review for a census of deemed savings to ensure they align with the New Orleans TRM and provide feedback approximately halfway through the program year. This approach allows for any mid-year adjustments to be made in real time before final tracking data and reporting. The results of the impact evaluation's project file reviews, desk audits, and site visits will also be used to verify the accuracy of the data, input assumptions, and calculations in the tracking system.

In addition, the tracking systems review will assess the effectiveness of collecting and applying tracking system information. We will document what is working well and any opportunities for improvement, such as ways to better integrate data requirements with current program procedures and processes to improve program performance and future evaluation results.

2.5.2 Ongoing Communication with ENO and TPAs

Effective communication—including timely feedback and recommendations—will support ENO and its TPAs in improving program designs to achieve goals more effectively. Our experience with large-scale portfolio-level evaluations highlights the importance of effectively disseminating information and data management internally and with clients and stakeholders. Tetra Tech places extremely high importance on communication and include biweekly meetings with ENO and the TPAs.

2.6 CONDUCTING PROCESS EVALUATIONS

Process evaluations examine how a program operates, including a description of how the program is implemented; the services delivered; as well as the resources, relationships, and infrastructure in place to affect program delivery. By documenting a program's development and operations, process evaluations can determine reasons for successful or unsuccessful performance and recommend improvements to enhance a program's efficiency, cost-effectiveness, and customer engagement.

*Tetra Tech's research methodology for process evaluations is **systematic and transparent** and establishes consistent communication with our clients.*

Our process evaluations draw on our collective decades of experience designing EM&V strategies—including our prior work with Entergy operating companies—to evaluate energy efficiency programs. Our experience will allow process evaluation activities to commence quickly following approval of the evaluation plans so that timely feedback is provided and process evaluations are completed before impact reporting.

Process evaluations begin by pursuing a thorough understanding of the program. Tetra Tech will review all documentation available for the programs, which can include marketing materials and outreach plans, logic models or process flows, applications, website information, implementer program manuals, program plans, and implementer survey results. Comprehensive and well-designed program materials encourage high-quality program services and consistent execution. The review of program materials will verify that program materials have been developed and contain critical elements to ensure program success. This research informs subsequent evaluation activities or may be performed in conjunction with early activities. For example, a review of program materials guides initial interviews with program staff to affirm an understanding of program design, assess the evaluability of a program, or ascertain the availability of additional data or documentation. These data and documents also support the development of survey questionnaires and sampling strategies.

2.6.1 Data and Sampling

The evaluation team will follow the guidance the New Orleans TRM provides, beginning with obtaining and reviewing program data to confirm the type, quality, and completeness of information captured. In addition, interviews with program managers and key implementation delivery staff will inform data and sampling strategies. The number of participating and nonparticipating trade allies sampled and interviewed will vary depending on the program. The evaluation planning process will identify trade allies that operate across multiple programs and take that into account in the sampling process for the participant sample.

2.6.2 Data Collection

The Tetra Tech team will collect data from program staff, program participants, and participating and nonparticipating market actors to support the process evaluations across ENO's portfolio. Surveys or interviews with retailers, manufacturers, or distributors will also be conducted to gather information for programs with midstream and upstream delivery channels. To be efficient and cost-effective, surveys and interviews with customers and trade allies will also collect data necessary to estimate NTG. We describe these activities below, starting with a review of program documentation and staff interviews, which provide the foundation for survey design and development of research questions.



Interviews with program and implementation staff. Our program evaluation process starts with interviewing ENO and implementation staff to gain an understanding of program design and delivery. These interviews are also an opportunity to review program successes and challenges as well as identify and prioritize researchable questions. As such, the staff interviews inform the development of customer survey questionnaires and topic guides for semi-structured interviews with trade allies.



Participating customer surveys. Surveying program participants gathers information to evaluate the effectiveness of program delivery and customer satisfaction. We will assess customer awareness of program offerings, potential barriers to participation, interactions with contractors, and identify program improvements from the perspective of customers. Surveys will also verify measure installation and collection information on free-ridership and spillover to support NTG estimation.



Participating and nonparticipating market actor interviews. We will conduct surveys or in-depth interviews with participating trade allies. These surveys will collect data on program awareness, effectiveness of program marketing, program satisfaction, and potential improvements. Trade allies can also provide useful insights into customer decision-making and barriers to participation. Although the relevant market actors will vary by program, we expect them to include retailers, contractors, manufacturers, distributors, design professionals, multifamily building owners, and auditors. While sampling will vary based on the program and data available, we envision sampling cases by stratifying the population of interest for most researchable issues (e.g., *high*-, *medium*-, and *low*-participating vendors).

All surveys will be implemented through Tetra Tech's in-house Survey Research Center (SRC) to maintain control of the quality of data collection. Tetra Tech has experienced SRC managers working with core staff who are trained to conduct residential and commercial energy efficiency program surveys. Our SRC conducts thousands of energy efficiency program surveys annually through telephone and multi-mode surveys, including surveys with Entergy Arkansas, Mississippi, and Texas customers. The SRC understands and respects the sensitivities of working with utility customer data, including the importance of respecting "do not call" lists and other utility client contact protocols.

The SRC uses multiple channels for advance notification (email, mail), maintains a dedicated toll-free phone number and email address to assist respondents, and works with clients to gain sponsorship and customize messages that will be easily understood, reflect client interests and values, and establish legitimacy. Skilled interviewers are adept in various survey methodologies, including web, telephone, and mail surveys, as well as combinations of these modes. Expertise with a range of methodologies and tailoring customer surveys to client and research needs help ensure successful data collection, maximize response, yield high-quality data, and reduce the burden on customers.

In-depth interviews are conducted by EM&V project team members, such as an evaluation researcher or energy engineer, depending on the target respondent and the focus of the interview. SRC interviewers can often facilitate this process by contacting market actors to schedule interviews or asking initial screening and eligibility questions where necessary.



2.7 CONDUCTING EVALUATION OF PROGRAM IMPACTS

As noted in the introduction (Section 1.0), we will integrate process and impact evaluation activities to the extent possible. Therefore, we address process and impact evaluation considerations as relevant in the sub-task summaries.

2.7.1 Data and Sampling

As discussed above, the evaluation team will begin with obtaining and reviewing program data to confirm the type, quality, and completeness of information captured as early as possible in the project startup phase.

When designing sampling plans for evaluations, we need to consider the homogeneity of the population of participants; this is especially true for impact evaluations where savings, installations, and decision-making processes can vary considerably by end-use and specific measures. Therefore, comprehensive sampling designs for impact evaluations will be important at an end-use level for multi-measure programs.

Different sampling strategies for impact evaluations will be developed for each program; these samples are often stratified to accurately represent the most significant portion of savings or measure-level results. For example, for evaluations of comprehensive programs such as Home Performance with ENERGY STAR®, we may want to stratify the sample by the level of participation and the type of measure received (e.g., *insulation, HVAC*).

Before implementing impact activities, we will develop a proposed sampling plan and sample sizes for ENO's review. The sampling plan will lay out the sample design and stratification approach, population size, selected sample size, expected number of completes, and projected level of precision.

2.7.2 Data Collection

This section describes the data collection and analysis activities we will conduct as part of the gross impact evaluations; the approach for NTG is discussed in Section 2.7.3. The reader is referred to Table 1, which summarizes all of the data collection activities, including process, NTG, and impact evaluation activities. As additional information is obtained through the project initiation meeting and evaluation planning process, we will make the appropriate revisions to the primary and secondary research activities when developing the annual evaluation plans.

Our field inspection staff consists of local engineers through Infinity Engineering. Each field staff member has a technical degree and years of experience in Louisiana; most are engineers and have experience performing field inspection work. High-quality guidance and oversight from senior Tetra Tech evaluators will ensure the quality of on-site M&V while also building local EM&V infrastructure.

In addition to tracking system reviews, participant surveys, and market actor surveys (also used to inform the impact evaluation), we will employ the primary data collection activities shown in Figure 1 for the impact evaluation.

Figure 1. Primary Gross Impact Evaluation Data Collection Methods



Engineering and file reviews. We will conduct engineering and project file reviews for a sample of projects from each program. The project file reviews will focus on (1) the calculations and assumptions used to estimate savings, (2) adherence to the TRM and deemed savings documents, and (3) the potential for differences in the verified gross savings and the reported savings. The findings of the project file reviews will influence the on-site verification activities conducted. After conducting the file reviews, targeted on-sites will be selected for on-site data collection, if applicable.

On-site data collection. Each site visit will include a physical inspection of measures and a customer interview to gather (1) information about the project for verification purposes and (2) information about the program (this assists the process evaluation). The on-site customer interview will expand upon the information obtained through the participant telephone survey. The on-site data collection protocols or site-specific M&V plan will gather detailed information and data specific to the project. Infinity Engineering's experience with the ENO customer base should make the data collection effort run smoothly.

Data logging and spot measurements. The data logging discussion below includes the team's *general approach* to fieldwork supporting EM&V projects; it does not necessarily reflect each program or measure plan, as these data are only needed for measures and projects with higher levels of uncertainty in savings. In most cases, the Tetra Tech team will attempt to utilize data recording features of customers' equipment as a cost-saving way of obtaining detailed data to analyze projects.

For projects that operate mainly at a steady state, the Tetra Tech team will record spot measurements of critical parameters such as amps, kilowatts, temperatures, and flow rates. These projects may include constant-speed fans and pumps or process heating or cooling systems that serve a constant load.

Data logging is typically used for one to two weeks for projects that operate with significant fluctuations. These projects might include *compressed air*, *variable frequency drives (VFD)*, and *controls* projects. Data may be logged to determine run times or include interval metering, where loads are recorded at specific intervals as they vary throughout the day or week.

New construction projects are assumed to have building automation systems (BAS) with user-friendly graphical interfaces. The Tetra Tech team will investigate design control algorithms produced by the controls contractor and verify actual algorithms by observing BAS setpoints. Data obtained from the on-site M&V will be analyzed using data analysis techniques as outlined in the TRM for the given technology. The recommended M&V methods will be based on the appropriate IPMVP Option to determine energy savings by technology.

Analysis of measures such as *VFDs* will consist of collecting short-term kilowatt measurements for the pre- and post-period and developing load profiles to quantify the annual kilowatt-hour savings (IPMVP Option B). For seasonal dependence measures, such as *electrically-driven chillers*, load profiles will need to incorporate dependencies such as ambient temperature. For measures such as *lighting*, metering will be limited to time-of-use logging, which will be used to develop load profiles for lighting operation and will be paired with deemed fixture wattages to obtain the load profile (IPMVP Option A).

Billing and meter data analysis. For the Behavioral program, a billing analysis approach is the most cost-effective method for determining the energy savings by program (IPMVP Option C) and agrees with industry best practices and the New Orleans TRM. This type of analysis can also isolate the savings of retrofit projects. For billing data, a regression analysis can be conducted for both the baseline and post-installation periods on the same population of participating customers (commonly called a *time-series comparison* of participants' billing data) to compare the energy usage of the two groups. A time-series comparison has the advantage of requiring billing data from participating customers only. An alternative study method that compares the participant population to a nonparticipant population has the added challenge of collecting billing data from non-incentivized customers. With ENO's rollout of AMI, we anticipate increased opportunities to use billing analysis for other programs and new measures. We also plan to analyze interval meter data for a census of demand response participants.

2.7.3 Net-to-Gross Ratios

The Tetra Tech team will update NTG ratios for each program at least once in the 2026–2028 program cycle in the order of priority as identified during the project initiation and planning stage. Estimating net savings is not only an impact evaluation tool; it also provides valuable insight into program design. Low NTG ratios can indicate poor program design, providing equipment of similar efficiency to what is standard in the current market, or an indication of incentives being too low.

Our team includes leaders in developing and using all net savings estimation methods, which is reflected in our authorship of much of the literature on net savings approaches and results, including the Department of Energy's Uniform Methods Project. Tetra Tech has also successfully calculated NTG ratios for other Entergy operating companies, where we have designed and implemented best practice evaluations using an enhanced self-report methodology.

Understanding the program theory and delivery strategy is a critical first step. Accurate NTG estimation requires understanding where and how the program influences the market or customers' decisions, and we use this information to carefully design measurement instruments and analysis strategies. Further value is achieved by delving into the data points that drive NTG—how program touch points affect customers' decisions to pursue energy efficiency or not (free-ridership) or when customers are making additional energy-saving investments outside the program (spillover). Tetra Tech's deeper investigation can yield insights into how to effectively capture more program savings. This research may suggest changes in program design, such as changes in measures, how measures are incentivized, or the target audience, or changes in how the program approach is marketing to its target audience or utilizing trade allies to convey messages and deliver services.



2.7.4 Estimating Free-Ridership Rates and Spillover

We will use an enhanced self-report method to estimate free-ridership and spillover, the two primary components of net savings. While there are limitations to the self-report model (most notably self-selection and response bias), the relative cost-effectiveness of this approach outweighs the limitations. As discussed in the introduction (Section 1.0), the process evaluation activities will be coordinated to the extent possible.

The NTG analysis integrates as many perspectives as are logical and available; multi-dimensional perspectives allow the Tetra Tech team to represent all program intervention points. The Tetra Tech team uses checkpoints and consistency checks to ensure the resulting estimates are as accurate as possible. The analysis process allocates free-ridership ratings in a staged approach to make the analysis as transparent to the evaluator and reviewer as possible. In addition, the Tetra Tech team will review open-ended responses to ensure the final NTG ratios are reflective of the responses to questions that are not directly integrated into the rating. As outlined in the New Orleans TRM, Tetra Tech will carefully consider the best timing of the interviews to estimate both free-ridership and spillover. It is evaluation best practice for free-ridership estimates to conduct the studies *close* to program participation to reduce potential recall bias. Conversely, in estimating spillover, it is optimal to contact customers *later* to allow for time to install efficient measures outside the program. We have successfully used a two-tiered timing sampling approach for free-ridership and spillover estimates for other Entergy operating companies. For example, when a program has been consistently implemented, we will sample participants from the prior year-and-a-half, estimating free-ridership from those who participated in the last 12 months and estimating spillover from those who participated 12–18 months prior to allow spillover actions to occur.

2.8 REPORTING EVALUATION STATUS AND RESULTS

The key to a successful evaluation is continual communication throughout the assessment period—annual kick-off meetings, biweekly status calls with ENO, biweekly calls with ENO and TPAs, monthly status reports to ENO and the Council, and interim reports and discussions—leading up to the final evaluation report. Tetra Tech plans to provide final EM&V reports annually by the end of March, and Tetra Tech will begin delivering draft report sections in the fall of the evaluated program year. We will begin with the process and NTG results in September and October. Draft residential and demand response program results will follow in November and December, and commercial, behavioral, and outreach program reporting in January and February. All results will be delivered in March to allow sufficient time to discuss key findings and recommendations in advance of the annual report filed as part of Energy Smart reporting. Tetra Tech will integrate appropriate feedback from the review and discussion of interim results and include additional context into key findings that will ensure we formulate actionable recommendations. Next, we discuss our communication and reporting processes to support this effective and successful annual reporting process.

2.9 UPDATING THE TECHNICAL REFERENCE MANUAL

Tetra Tech is committed to regularly updating the Technical Reference Manual (TRM) as a vital industry best practice, ensuring that savings estimates and energy algorithms reflect the most accurate and current information while adapting to evolving baselines. Our collaborative efforts with ENO, its TPAs, the Council, and other stakeholders aim to enhance the New Orleans TRM's value by delivering improved savings estimates through a transparent evaluation process. Additionally, we will incorporate new technologies and program approaches as necessary to align with emerging trends and stakeholder needs.

Tetra Tech is dedicated to building stakeholder confidence in energy efficiency savings and demand reductions by actively collaborating with ENO, the Council, and other relevant parties to identify priority measures and research needs during the New Orleans TRM update process. We will also explore the broader application of AMI analyses to enhance the TRM updates, ensuring that the resulting measures are well-supported by data and effectively address the energy efficiency challenges faced in the region. This collaborative approach will help us create a robust framework for sustained energy savings and informed decision-making.

Tetra Tech will focus on supporting the development of the *Total Resource Cost (TRC)* by facilitating new customer segments and energy efficiency improvements through standardized M&V protocols and deemed savings, particularly for emerging technologies such as *mini-split air conditioners* and *heat pumps*, *electric vehicle supply equipment*, and *solar attic fans*. The team will work in collaboration with ENO and other stakeholders to establish consistent M&V protocols for applicable technologies, having already developed protocols for *solar photovoltaic (PV)*, *variable refrigerant flow (VRF) systems*, and other innovative energy efficiency measures in neighboring Entergy territories.

The Tetra Tech team will conduct an annual review of the TRM to determine necessary updates, primarily driven by feedback from user organizations and collaborative efforts with ENO and the TRM Working Group. This process will consider insights from previous iterations, including New Orleans TRM Version 8.0, and will evaluate advancements in measure technology, baselines, and industry standards. Tetra Tech is committed to facilitating stakeholder involvement through a dedicated Microsoft Teams site, ensuring comprehensive stakeholder feedback is integrated into the updates. Once the TRM Working Group finalizes the revisions, Tetra Tech will support ENO and the Council in disseminating the updated TRM for public review before finalization.

*With **extensive experience in TRMs**, including leading updates in Texas, Arkansas, Iowa, and the Northeast, Tetra Tech is well-positioned to effectively enhance the TRM process*

2.10 PROJECT SCHEDULE

Tetra Tech views itself as a partner to ENO; therefore, we designed an evaluation schedule that provides a timely and transparent process with results fully vetted with ENO and its TPAs to ensure the results are understandable and actionable. Tetra Tech will meet with ENO staff to establish an evaluation framework for 2026 and the full, three-year program cycle as part of the project kick-off. After receiving input from ENO and conducting interviews with implementation staff to gain additional insights into program operations and planning, we will use the kick-off and implementer interviews to inform the evaluation plan, which will be provided to ENO for review before finalization.

Each program's sampling plan will be described in individual sampling memos provided to ENO before collecting primary data or requesting additional data from implementers. After a specific evaluation activity, we will provide detailed process, NTG, or impact evaluation results via interim memos. Interim memos provide ENO with information on how each program is operating during the current program year and provide insight into results that will ultimately be reported in the annual evaluation report. The first interim memos will be available in the fall of 2026, and Tetra Tech will continue to provide interim memos to ENO as evaluation activities are completed. We will work with ENO staff each program year to design a reporting schedule that provides ample time to review interim memos and the annual evaluation report.

We plan to provide each program's energy and demand savings to ENO as the program's results are finalized for the program year (instead of holding all impact savings estimates until the portfolio's savings have been finalized). We believe this staggered approach eases both parties' reviewing and reporting burdens, and we have successfully implemented this reporting method with other clients. Draft savings estimates will be provided by the end of February; finalized savings estimates will follow by the end of March, quickly followed by a draft evaluation report for review and comment. After incorporating ENO's feedback, we will provide a final annual evaluation report in April. Subsequent program years would follow a similar schedule with the current program year evaluation planning and final reporting for the prior program year, which overlaps from January to March.

3.0 EXECUTION STRATEGY

Tetra Tech has a solid strategy in place for successful project execution, which includes (1) a team of energy experts who are committed to roles that align with their strengths, (2) a targeted training element to meet ENO's TPA's, or Council's needs, and (3) cybersecurity protocols to ensure the protection of customer data and other ENO confidential assets.

3.1.1 Training

The Tetra Tech team includes several experienced trainers ready to develop and deliver targeted training to meet ENO's, TPA's, or Council's needs. In addition to formal training needs, the Tetra Tech team has developed practices to train local resources. For example, we successfully trained local engineering resources and staff in Arkansas and Texas.

3.1.2 Cybersecurity

The protection of customer data and other ENO confidential assets is a prime responsibility of Tetra Tech and one we take seriously. At the corporate level, we continually invest in our security team and hardware and software security tools. Our cybersecurity team considers the impact of people, processes, and systems to establish a risk-based and prioritized set of baseline policies and practices. These processes protect company and partner data systems,

align with company goals, and ensure compliance with legal, regulatory, and industry best practices. We are experienced in working with data as sensitive as health records and military information and have earned the trust of utilities across the country and various state and federal agencies. Tetra Tech trains all staff on common cybersecurity issues such as increasingly common social engineering attacks, malicious code delivered via hyperlinks or macros, and weak passwords. We follow up on this training by conducting behavioral audits of how the staff handles "threats" generated by our security team. Further training is delivered as warranted.

We build on the corporate structure at the project level with our tools and practices. For example, we keep personally identifying information and other data secure and confidential; we follow strict procedures to make this happen during data collection, processing, storage, and retrieval. All data is encrypted during transfer between team members and Tetra Tech (via Microsoft OneDrive or SharePoint) and while at rest on our internal servers, which are physically secured and protected by industry-standard firewalls and switches. In addition, all staff laptops with access to this data are encrypted. Project files are restricted to the local business unit and are separated virtually from the rest of Tetra Tech's data; client data are strictly segregated.



3.2 ANNUAL BUDGETS

Tetra Tech built a scope of work around the programs and tasks provided in the RFP and historical funding levels of EM&V contractors in New Orleans, allowing the team to balance the appropriate level of rigor and meet evaluation objectives. We are proud to be partnering with a local partner, Infinity Engineering. The EM&V budget is set at 4.0% of program costs.

Below, we document a number of budget assumptions for the reader's consideration in reviewing the program budgets:

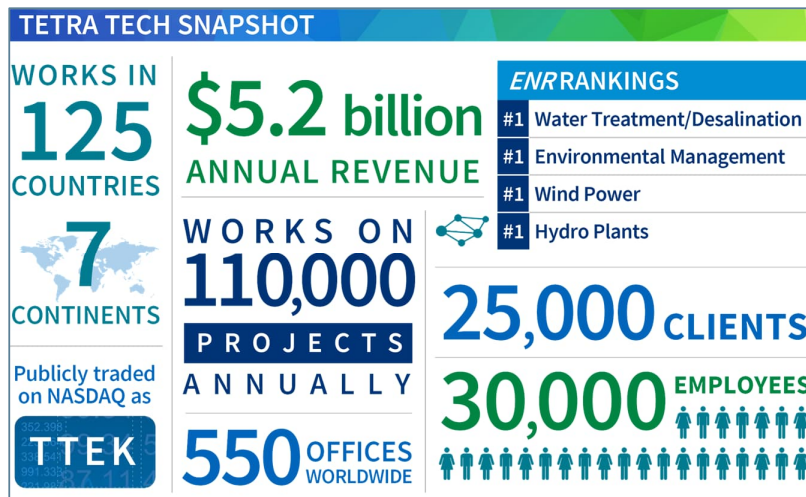
- Final budgets are inclusive of all labor and non-labor costs.
- Impact evaluation activities will occur annually.
- Funds may be shifted across programs, tasks, years, and staff as long as the overall multi-year budget is not exceeded.
- Staff promoted during the contract period will be reclassified into the appropriate rank.
- Travel costs (e.g., transportation, lodging, meals) will be billed at cost.

4.0 EXPERIENCE AND QUALIFICATIONS

The sections below provide a brief overview of Tetra Tech, the prime contractor, and our company balance sheet, income statement, and cash flow reports for FY2024. These items demonstrate our company's success and reliability, which are direct results of our hard work and perseverance, which has established our unwavering reputation as a leading engineering and consulting firm. We also include relevant experience to highlight the Tetra Tech team's familiarity with program evaluations of similar size and scope, as well as references that can speak to our team's approach and successful project executions.

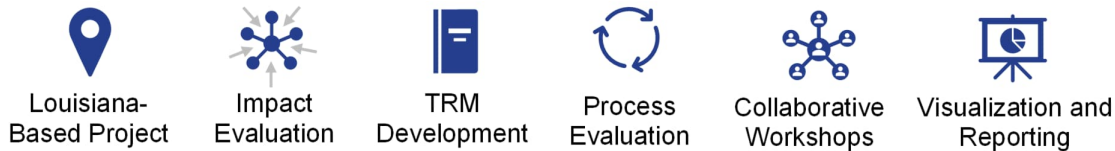
4.1 COMPANY INFORMATION

Tetra Tech, Inc. (Tetra Tech) is a publicly traded leading consulting and engineering services provider. The company was founded in 1966 to provide engineering services for waterways, harbors, and coastal areas. Over the next 55 years—through strategic acquisitions and internal growth—Tetra Tech expanded its service offerings to include engineering and consulting services for renewable energy, water, environment, sustainable infrastructure, and international development sectors. Tetra Tech is headquartered in Pasadena, California, has 550 satellite offices (national and international) throughout the world, and has over 30,000 employees across the globe to support approximately 110,000 annual projects.



4.2 RELEVANT EXPERIENCE

The projects listed below were selected to highlight the Tetra Tech team's capabilities and experience in providing best-in-class services for clients with projects of similar scope and size. We lead with Louisiana experience, followed by regional experience, and end with nationwide experience. Each project description is accompanied by icons to depict key characteristics and activities.



4.2.1 Local Relevant Experience



EM&V of Program Year 2024 (PY2024) Portfolio of Energy Efficiency Programs, APTIM Environmental, 2024–Present. Tetra Tech was hired by APTIM Environmental and Infrastructure, Inc. (APTIM), the program administrator for Entergy Louisiana, LLC (ELL), to provide EM&V services for ELL's PY2024 and PY2025 energy efficiency portfolio. The process and impact evaluation activities are designed to provide proactive, up-front technical assistance and meaningful feedback on program performance as the programs evolve in response to dynamic market conditions, customer and trade ally needs, and policy and regulatory changes. Evaluated programs include residential (manufactured homes, multifamily, low-income, new construction, upstream, midstream, and online distribution), education, large commercial and industrial, and agriculture. As the EM&V contractor for PY2024, Tetra Tech (1) established evaluation framework and guidance; (2) developed evaluation plans that addressed cross-cutting, portfolio-related issues, and program-specific needs; (3) established M&V and due diligence procedures for implementers through comparison of QA/QC activities to industry-standard practices and surveying a sample of projects; (4) reviewed tracking systems and program theories and maintained program communications; (5) conducted evaluations of program impacts through program data and interviews with program managers and key implementation delivery staff, and customer surveys for residential and commercial sectors; (6) reported on the evaluation status and results via established communication protocols, recurring status meetings, and clear project reporting; and (7) provided an essential management decision-making support service that fully meets regulatory needs.

In addition to the utility-specific projects listed above, Tetra Tech conducts several other types of energy and environmental work in the State of Louisiana, including but not limited to biogas, wind, levees, disaster recovery, debris removal, and coastal protection and restoration services.



Biogas Expansion Project, Louisiana St. Landry Parish, 2024. Tetra Tech's BioCNG group is leading a team to assist the St. Landry Parish Solid Waste Disposal District with implementing an expansion of their successful BioCNG™ biogas conditioning system at the district's landfill in Washington, Louisiana. Tetra Tech is the co-inventor of the patent pending BioCNG system. The District also commissioned BioCNG to design and construct an off-site renewable natural gas (RNG) fueling station with natural gas backup.

BioCNG provided design, permitting, installation, and startup for the biogas-to-RNG facility. BioCNG first installed a BioCNG 50 gas conditioning unit at the landfill in 2012 and later added a BioCNG 100 expansion unit with an off-site fueling station in 2015. BioCNG provided the gas cleanup skids, RNG storage, and fast fueling stations. The expansion system included a satellite RNG station that is fueled with RNG hauled from the landfill via a tube trailer with natural gas backup.

The results include significant air quality benefits, unique environmental education opportunities for the local community, and an invitation from the State of Louisiana for the District to travel to France to discuss its success story during a trade mission.



FEMA-Criterion Levee System Design and Verification, Flood Protection Authority-East, 2024.

Tetra Tech worked with the Flood Protection Authority-East (Authority) in Louisiana to inspect, analyze, and rehabilitate the 40 Arpent Levee to meet Federal Emergency Management Agency (FEMA) requirements for levee certification.

On behalf of the Authority, our team completed the full scope of work for the certification of this system, which includes 24 miles of earthen levee system, 5 miles of steel sheet pile floodwall, seven pump stations, and five closure structures. The initial inspection of all system features informed what analyses were needed (wave, geotechnical, and structural) as well as the current performance of the levee system. At project completion, Tetra Tech documented the final condition of the system by integrating the Authority's drone aerial survey, which was supported by our Tetra Tech Delta expertise, with a physical validation and calibration field inspection.

Our team performed the environmental evaluation and permitting and benefit-cost analyses to support a grant application under the Community Development Block Grant program. The project was awarded the full requested amount, which significantly offset the cost of construction. This project was submitted to FEMA for accreditation of the levee system based on the inspection, design, and analysis performed by Tetra Tech. The accreditation will allow thousands of area residents to purchase low-cost insurance based on the reduction in risk provided by the levee.



Pumping Station Electrical Design and Resident Inspection of the North Broad Street Underpass, Sewerage & Water Board of New Orleans, 2015–2020.

Infinity Engineering provided electrical engineering design and resident inspection for the North Broad Street Underpass Pumping Station. The repairs to the pumping station and historic building presented unique challenges to keep the station operational during construction. The electrical design upgrades included the replacement of two electrical boards, the main electrical duct bank and wiring, a service ground system, and two 40 HP 25 Hz motor starters. Resident inspection services were conducted throughout the duration of the project for the mechanical, electrical, and general construction phases of the repairs. Infinity Engineering's resident inspector, Rodney Ziegler, received a letter from the Sewerage & Water Board commending him on his continuous, clear reporting and communication during the construction process.



Design and Construction of Canal Street Ferry Terminal, Regional Transit Authority, 2019–2024.

The Regional Transit Authority has opted to redesign the Canal Street Ferry Terminal to focus solely on pedestrian traffic with the design of a new terminal building using the construction management at-risk (CMAR) delivery method. Infinity Engineering is the prime consultant providing civil structural, mechanical, and electrical engineering design services and overseeing the design-build and providing routine inspections. Per the conceptual drawings, the new terminal will include a new dock structure to infill the space between the two neighboring wharf structures where the current ferry terminal is located. Additionally, a new terminal building is under construction to focus on the ease of passenger transfers at this upgraded transportation hub. Infinity Engineering provided electrical and power designs for the terminal building and exterior lighting.



Campus Improvements—Electrical Design and Construction Administration, Dillard University, 2018–2020. As the prime consultant, Infinity Engineering provided civil, structural, mechanical, and electrical engineering designs for the improvements to multiple systems throughout the Dillard University campus. The projects ranged from civil road work to electrical lighting and low-voltage communication systems. Additionally, Infinity Engineering provided construction administration services with routine inspections performed throughout construction. This beautification project included upgraded electrical designs for pathways and landscape features. The electrical designs also included power for a new guard shack and surveillance systems.



Design and Construction Administration, Criminal Evidence and Processing Center, 2017–2022. Infinity Engineering provided mechanical and electrical design for a new five-story municipal building for the New Orleans Police Department. While under construction, Infinity Engineering has also been providing construction administration with routine inspections. The electrical engineering designs included primary power, emergency power, telephone, data/communications, fire alarm systems, access control systems, site lighting, interior lighting, emergency lighting, video surveillance systems, grounding and bonding systems, motor control centers, and public address systems. All electrical systems are provided with an uninterruptible power supply system for each of the five floors of the facility.

4.2.2 Regional Experience



Evaluation, Measurement, and Verification of Energy Efficiency Programs, Entergy Arkansas, LLC, 2016–Present. Entergy Arkansas, LLC (EAL) hired Tetra Tech to conduct EM&V of EAL's portfolio of residential and commercial energy efficiency and demand response programs. EAL's program portfolio provides a comprehensive range of customer options coupled with education and training activities. EM&V activities have included developing multi-year and annual detailed evaluation plans, impact evaluation, process evaluation, ad hoc analyses, investigations into increasing the cost-effectiveness of new measures, and providing updates to inputs in the Arkansas TRM. Tetra Tech staff schedule biweekly meetings with EAL and program implementation staff to review (1) larger projects that may need a measurement and verification (M&V) plan and (2) projects that are being reviewed as part of the annual evaluation cycle. Teams are set up by sector, one for C&I and one for residential (including agriculture).

EM&V activities in Arkansas are primarily driven by the Arkansas Public Service Commission Rules for Conservation and Energy Efficiency Programs and the Arkansas TRM. Additionally, evaluators work closely with the Independent Evaluation Monitor (IEM) and the Parties Working Collaboratively (PWC) to ensure consistency across the state. In this environment, our overarching approach to evaluations has been to (1) verify program tracking data and correctly apply the TRM to calculate savings following the current TRM version; (2) estimate annual gross and net energy and demand impacts for high-impact measures, program, and portfolio levels; (3) adjust program-reported gross savings using the results of evaluation research, leveraging the tracking system and engineering desk reviews, metered data analysis, on-site verification, and equipment metering; (4) determine NTG estimates, which in some years, includes primary research and, in other years, includes consulting with the IEM to leverage prior years' analyses to apply deemed program NTG values that also recognize any changes in program design or the measure mix; (5) provide complete documentation and transparency of all evaluated savings estimates, and where relevant, compare with TRM calculations, as recommended by the IEM; and (6) provide ongoing technical reviews and guidance to

EAL and implementers.

As an ad hoc service request, EAL sought to identify and serve customer segments that could benefit most from energy efficiency improvements delivered through its suite of programs. Tetra Tech proposed estimating the energy burden experienced by EAL's low-income customers via the percentage of gross household income spent on electricity costs, as industry research suggests low-income households spend almost three times as much of their income on energy needs as non-low-income households. The resulting analysis and visualizations provided EAL with a tool to identify additional areas of low-income customers for participation in their portfolio of energy efficiency programs, as required by Act 1102.



Independent Evaluation, Measurement, and Verification, Entergy Mississippi, LLC, 2014–Present. Since 2014, Tetra Tech has been collaborating with both Entergy Mississippi, LLC (EML) and ICF annually to develop an EM&V scope of work for each program that meets EML's objectives, including developing guidance related to the levels of rigor associated with each program. Each year, Tetra Tech confirms program impacts for all programs by reviewing ICF's program tracking database, desk reviews, and on-sites. EML and ICF use the Arkansas TRM to estimate most measure-level energy savings. Process evaluations are conducted for different programs each year and typically include activities such as program staff interviews, phone and/or web surveys with participating and nonparticipating customers and market actors, and benchmarking research. Additionally, Tetra Tech reviews new measure savings estimates proposed by ICF and provides other ad hoc support. Information collected allows Tetra Tech to provide feedback on program progress and performance, identify what worked well with the programs and potential areas for improvement, and outline actional recommendations for program improvements.



Evaluation of IOU Energy Efficiency Portfolios, Public Utility Commission of Texas, 2013–Present. Tetra Tech leads the statewide evaluation effort of Texas' energy efficiency programs across the eight investor-owned utilities (including Entergy Texas, Inc.), which includes over 130 programs. The multi-utility EM&V effort documents gross and net energy and demand impacts of the utilities' portfolios. Tetra Tech calculates program cost-effectiveness; provides feedback to the Public Utility Commission of Texas, utilities, and other stakeholders on program portfolio performance; provides ongoing technical assistance, policy, and planning support; and maintains and updates the Texas Technical Reference Manual (TRM) annually.

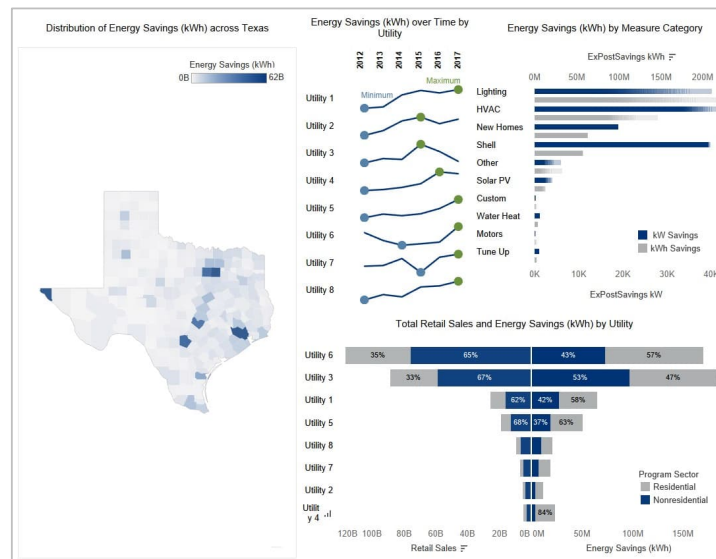


Tetra Tech leads statewide collaborative groups on both the TRM updates and recommendations to improve the energy efficiency programs. Evaluated programs include conventional energy efficiency programs, as well as low-income, demand response, and solar photovoltaic (PV) programs. Highlights of Tetra Tech's evaluation effort include the development of evaluation tracking and reporting systems for the PUCT. The tracking system incorporates both implementation and evaluation tracking

data from multiple years of program operation and supports reporting to the PUCT and the public. The EM&V database, which is updated at regular intervals over the course of each program year, allows Tetra Tech to conduct efficient sampling across utilities, programs, and program years to complete desk reviews, customer surveys, market actor interviews, and on-site M&V as prioritized in the evaluation planning process. Annually, and working closely with the PUCT and utilities, Tetra Tech proposes activities tailored by program and measure type considering key factors that include contributions toward savings; level of savings uncertainty; availability of defensible, relevant secondary data; and importance to future portfolios.

In support of the evaluation activities and promoting transparency, Tetra Tech developed a reporting dashboard that shows project-level information related to the distribution of energy savings across Texas, energy savings by utility and measure category, and retail sales and energy savings by sector and utility. An anonymized version of the dashboard is shown in Figure 2.

Figure 2. Example Reporting Dashboard for the Public Utility Commission of Texas Developed by Tetra Tech



In response to reliably delivering the highest quality work products and exemplary technical service and policy support, **Tetra Tech has consistently received the highest vendor rating** of an A from the state of Texas for this work.³

³ Tetra Tech's latest Vendor Performance Report (published August 2024) is available on the Texas SmartBuy website: <https://www.txsmartbuy.gov/vpts/19541485140/89006>

4.2.3 Nationwide Experience



Energy Efficiency Evaluation Services, MidAmerican Energy Company, 2012–Present. Tetra Tech is leading the independent impact, process, and NTG evaluation activities of MidAmerican Energy Company's (MidAmerican) portfolio of residential and nonresidential energy efficiency and demand response programs in Iowa and Illinois. The key objectives are to verify reported energy, demand savings, and project savings; provide recommendations to improve program design and implementation; and develop a best-in-class evaluation infrastructure. In addition to program-level impact evaluation activities and ad hoc projects, Tetra Tech participates in the Iowa TRM Technical Advisory Committee (TAC). As part of the TAC, Tetra Tech provides critical input and review of updates to existing measures and the commercial measure prototype and modeling process.

The Tetra Tech team created several dashboards, a geocoding of program participants, and the development of several web-based tools for cost-effectiveness and nonresidential demand response evaluation. These tools and dashboards increased the transparency of the evaluation, making data more accessible through user-friendly, low-code visualizations. For example, Tetra Tech created a reporting dashboard for MidAmerican's Home Energy Needs Survey, which was used to inform program decisions and plan subsequent program cycles. Tetra Tech developed a participation tool during the prior evaluation cycle that mapped past program participants with demographic information, which allowed for program and resource planning. Lastly, Tetra Tech worked with MidAmerican to update its cost-effectiveness tool and developed an automated demand response savings platform in 2024. Figure 3 through Figure 5 show examples of each of the tools discussed above.

Figure 3. Reporting Dashboard Developed by Tetra Tech for Home Energy Survey

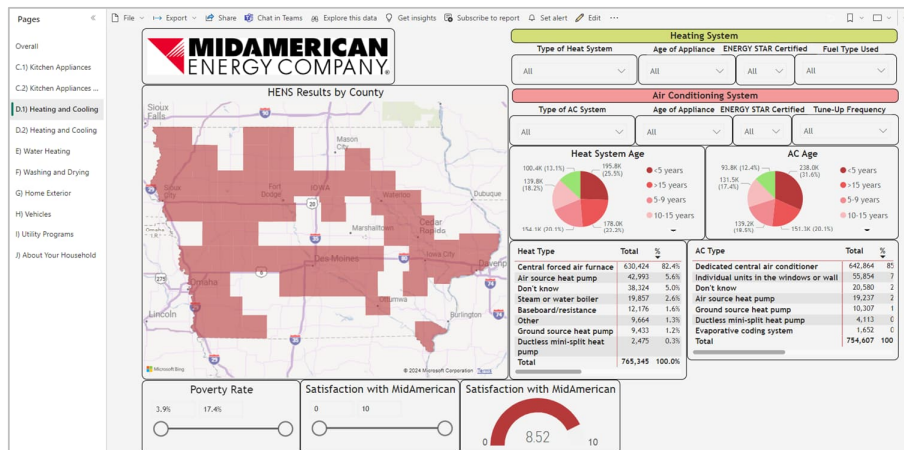


Figure 4. Program Participant Mapping Dashboard Developed by Tetra Tech

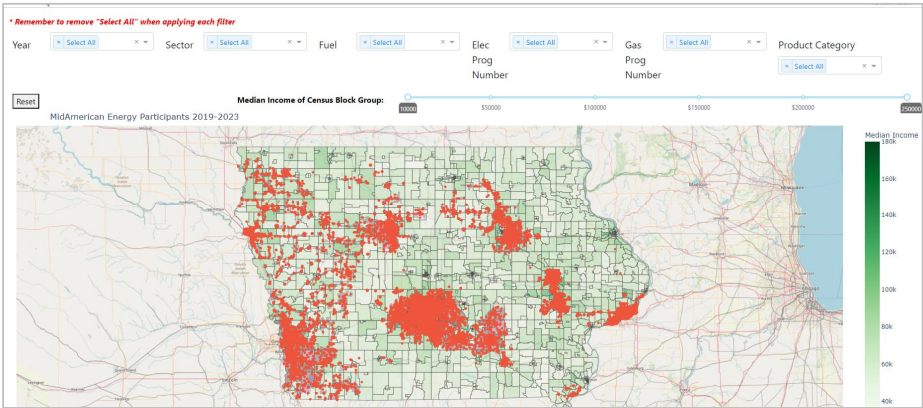
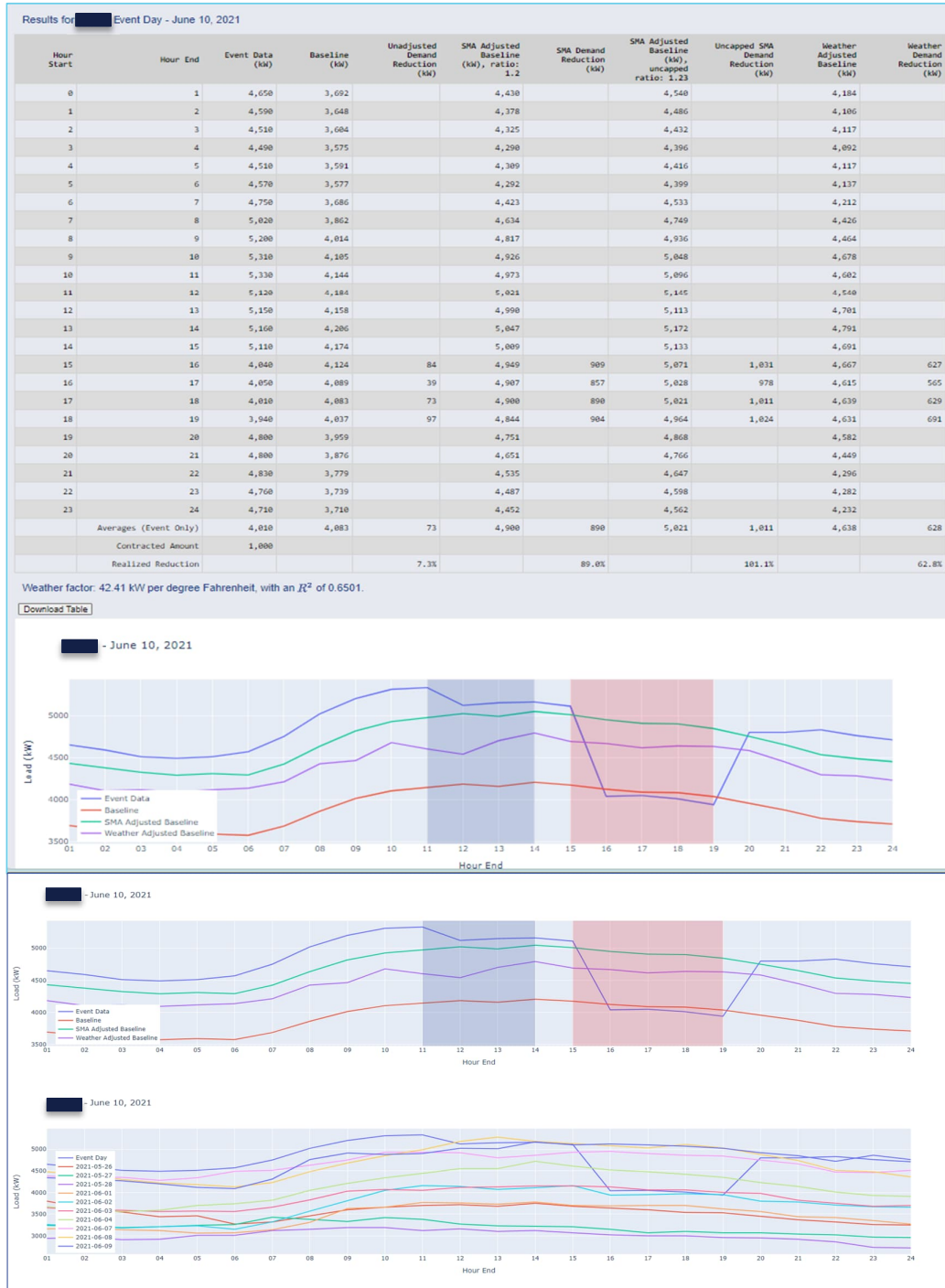


Figure 5. Sample Demand Response Evaluation Platform Developed by Tetra Tech





Demand-Side Management Net-to-Gross, Appliance Saturation, and Market Transformation Studies, NV Energy, 2023, 2020, 2018, 2016, 2012. Tetra Tech led the Free-Ridership And Spillover Study to recommend NTG values for NV Energy's demand-side management (DSM), demand response, and energy efficiency programs for their 2021 Integrated Resource Plan (IRP) and in future proceedings before the Public Utilities Commission of Nevada. Tetra Tech determined NTG values for the programs through rigorous methodologies tailored to program type. The Tetra Tech team used the current program cycle research—along with longitudinal analysis of saturation data, market transformation data collection activities, benchmarking results, and in-depth discussions with NV Energy staff and their implementers about future program design and delivery changes—to project future NTG values. Tetra Tech collected data through participant self-report surveys and interviews; trade ally surveys and interviews; influential vendor interviews; a nonparticipant spillover survey; and a market effects study. Tetra Tech also analyzed the Home Energy Rating System (HERS) index to relate free-ridership against various HERS scores and program incentives. Tetra Tech conducted secondary research for a benchmarking effort. From the data collected, NTG values were calculated using industry-standard methodologies; results were defended with written testimony to the Public Utilities Commission of Nevada and informed future NV Energy program designs to maximize net savings resulting from the programs.



Comprehensive Evaluation of Colorado, Iowa, and Wyoming Energy Efficiency Portfolios, Colorado 2010–Present; Iowa 2010–2013 and 2015–2018; Wyoming 2011–2014 and 2016–Present. Tetra Tech leads the multiyear process and impact evaluation of Black Hills Energy's energy efficiency and demand response programs portfolio in their Colorado electric and gas territories and their Iowa gas territory. Tetra Tech conducts a comprehensive evaluation (both impact and process) of each program once over each three-year cycle. Black Hills is committed to offering the highest quality programs to its customers—programs that both meet energy savings goals and result in high customer satisfaction. To assist Black Hills in running effective programs, Tetra Tech collaborated with Black Hills to develop a “best of class” evaluation infrastructure for its energy efficiency and demand response programs. As a result of research findings and recommendations from the Tetra Tech team, Black Hills Energy has adjusted marketing strategies for several programs, improved trade ally communication and training, restructured staff internally for better program coverage, and added third-party quality controls.



Special/Cross-Cutting Evaluations, Massachusetts Program Administrators, 2003–Present. Tetra Tech has been heavily involved in the evaluation of Massachusetts Energy Efficiency programs since 2003 when a multi-year statewide NTG collaborative was launched. The goal of the collaboration was to develop guidelines for estimating net program impacts for the Massachusetts PAs' programs consistently to enable comparisons of trends over time. Updates to this framework completed in 2011 included a comprehensive literature review of methods for measuring NTG, a discussion of the advantages and disadvantages of alternative methods for estimating net savings, the development of a decision framework for selecting appropriate methodologies, and a discussion of best practice elements for survey design, data collection, and analytic methods. Tetra Tech updated the framework again in 2017 (TXC08) to reflect methods currently being used in other regions across the country or considered for use in Massachusetts and the development of a consistent methodology for self-reported NTG (MA19X03-B-RSRNTG) for residential downstream programs.



Evaluation, Measurement, and Verification of the DC Sustainable Energy Utility Portfolio of Energy Efficiency and Renewable Energy Programs, District Department of the Environment, 2012–2017.

Tetra Tech and its team of evaluators provided independent EM&V of the DC Sustainable Energy Utility (DCSEU) suite of energy efficiency and renewable energy programs. Tetra Tech and the evaluation team worked with the DCSEU to (1) implement a framework for savings measurement and verification (M&V); (2) evaluate and verify reported results of the DCSEU portfolio of energy efficiency and renewable energy programs and the six performance benchmarks (per capita energy consumption reduction, increasing renewable energy generating capacity, peak electricity demand reduction, increasing low-income housing stock energy efficiency, reducing the energy demand of DC's largest energy users, and creating green jobs); and (3) establish and maintain an evaluation tracking system.



Statewide Residential Baseline Study, New York State Energy Research and Development Authority, 2012–2015.

In 2012–2015, Tetra Tech led a team hired by the New York State Energy Research and Development Authority (NYSERDA) to conduct a statewide residential baseline study. Tetra Tech collaborated with NYSERDA, the E2 Working Group, and the New York State Department of Public Service (DPS). The study included single-family and multifamily residential housing segments and a broad range of energy uses and efficiency measures. The overall objective of the study was to understand the residential building stock and associated energy use, including the saturations of energy-consuming equipment (electric, natural gas, and where possible, non-electric and natural gas heating fuels) and the penetrations of energy-efficient equipment, building characteristics, and energy management practices. The study also collected customer household and demographic information that can be correlated with energy usage features. The information gleaned from this study has been used by NYSERDA, the DPS, New York State program administrators, and other stakeholders to (1) set more accurate baselines for calculating energy savings, (2) estimate the influence of NYSERDA's and other New York State program administrators' activities on the market, and (3) support program planning. The project had three main components:

Residential Baseline Study. The evaluation team conducted a comprehensive statewide baseline study of the residential market across a broad range of customer segments and energy measures, including (1) new and existing single-family buildings (one to four units) and (2) new and existing multifamily buildings (five units or more), including dwelling units, common areas, and whole buildings. Data were first collected through a combination of web and telephone surveys. On-site data collection was then completed for a sample of the web and telephone survey respondents, along with residential sample lists from other sources.

HVAC Market Assessment. Data to support the HVAC market assessment were collected in baseline study surveys and on-sites, contractor interviews, and distributor sales reports to assess the market for non-electric heating, air conditioning, and water heating equipment. Data on the baseline efficiency of new equipment installed in New York State were gathered during HVAC contractor surveys and from D&R International through an agreement with the Heating Air-conditioning & Refrigeration Distributors International (HARDI). These were compared to data from the on-site surveys for new equipment (2012 and after).

Residential Potential Study. The data from the baseline analysis and the HVAC market assessment were used as inputs to the potential analysis. The analysis identified the technical, economic, and achievable residential energy efficiency opportunities in New York. The potential study also defined the baselines by measure for the analysis that could be used for more detailed program planning.

5.0 UTILIZATION OF SUBCONTRACTORS

Tetra Tech started as a small business in 1966 and has grown to be a leading provider of consulting and engineering services.

Subcontracting Plan for Contractors

Tetra Tech will partner with Infinity Engineering Consultants, LLC (Infinity Engineering), a local and diverse subcontractor, to provide on-site measurement and verification (M&V) and engineering desk reviews.

Tetra Tech plans to subcontract with Infinity Engineering to conduct multiyear process and impact evaluations for Entergy New Orleans (ENO). This partnership allows our team align with ENO's mission of serving its four stakeholders and supporting Entergy's focus on customer centricity and diversity, inclusion, and belonging.

5.1.1 Infinity Engineering Consultants, LLC

Infinity Engineering is a multi-discipline engineering firm with specific expertise in ushering municipal projects from the earliest conceptual stages all the way through final construction and inspection. Infinity Engineering's in-house design services blend the disciplines of civil, structural, mechanical, and electrical engineering to create a world-class organization capable of taking on any assigned engineering project. This multi-discipline approach allows Infinity Engineering's engineers to produce designs in open collaboration with more efficient communication. Ultimately, Infinity Engineering's multi-discipline collaborative culture creates the opportunity for projects to be completed on a more expedited schedule.

Infinity Engineering is headquartered in Metairie, Louisiana, and has an additional office in Baton Rouge. Founded in 2004, Infinity Engineering's total full-time staff includes 11 professional engineers, 4 engineering interns, 3 engineering graduates, 9 AutoCAD designers, 4 resident inspectors, and administrative support personnel. With every project, they seek to understand how its engineering designs will impact the people, places, and environments within its communities. Whether it is a public or commercial endeavor, Infinity Engineering is determined to improve the vitality of each community it engages with; Infinity Engineering achieves this by creating forward-thinking designs that exceed the demands of everyday life.

5.1.2 Awards and Recognition

Tetra Tech has worked continually to improve the participation of small businesses in our projects. Across all the markets we serve, we are proud to work with small businesses from every socioeconomic category. Our partnering philosophy is shared across our global operations. We strongly believe that through shared training, we can achieve socioeconomic goals; enhance the development of small businesses; execute work safely, on schedule, and within budget; and meet contract quality objectives.

The US federal government has recognized Tetra Tech with numerous awards for our proven record and well-defined process to mentor, guide, and train small businesses. Recent awards include:



Dwight D. Eisenhower Award, Excellence in the Services Category, US Small Business Administration (SBA), 2022, 2021, 2018, 2013. This award recognizes large federal government contractors with effective small business subcontracting programs that create the maximum practicable opportunity for small businesses, veteran-owned small businesses, service-disabled, veteran-owned small businesses, HUBZone small businesses, small, disadvantaged businesses, and women-owned small business concerns. Tetra Tech was selected for this award based on an evaluation of our program, including our standard operating procedures, national subcontracting leadership and small business liaison officers, small business outreach, use of small businesses in all socioeconomic categories, and participation in the Mentor-Protégé program.



Society of American Military Engineers (SAME) Large Business Award, 2021, 2016. The award recognizes outstanding small business subcontracting performance supporting US Department of Defense programs, participation in the US Small Business Administration Mentor-Protégé Program, employee training supporting small business initiatives, and participation at small business conferences. Tetra Tech has been a SAME Sustaining Member Company since 1985, with active membership at more than 50 SAME posts. We are committed to being an excellent small business partner and mentor, collaborating with them by using our *Leading with Science*® approach to best serve our global customers. We have participated in various US federal government mentor-protégé programs since the early 1990s and have mentored more than 40 firms during that time. Since 2007, Tetra Tech has subcontracted more than \$1 billion to small businesses across all federal agencies and has supported small businesses to win hundreds of millions of dollars of prime contracts on their own.

Report of Entergy New Orleans, LLC Identifying its Selection of Third Party Administrators and Evaluator of the Energy Smart Programs For Program Years 16-18

I. Introduction

Entergy New Orleans, LLC (“ENO” or the “Company”) submits this report identifying its selection of the consultants to support the implementation of the Energy Smart Programs for Program Years (“PY”) 16-18, running from January 1, 2026, through December 31, 2028. As a result of the Request for Proposals (“RFP”) process, ENO has selected Aptim Environmental (“Aptim”), Honeywell Smart Energy (“Honeywell”), EnergyHub, Bidgely, and National Theater for Children (“NTC”) as Third Party Administrators (“TPA”) and Tetra Tech as the Third Party Evaluator (“TPE”). ENO requests Council assent to the selections described herein.

II. RFP Timeline and Process

Task	Date Completed
RFP Issued	1/7/2025
Proposal Submission Deadline	2/27/2025
Bid Finalists Interviewed	4/29/2025-5/6/2025
Bidder Evaluations Completed	Late May 2025

A total of 14 companies submitted proposals and all bids were advanced to the final round.

Type of Proposal	Number Received
Energy Efficiency TPA (Multiple Programs)	2
Demand Response TPA (Multiple Programs)	6
Behavioral Program	2
Pilot Programs	7
Schoolkits Program	1
Third Party Evaluator	3

III. Third Party Administrator Selection

A. Details of Energy Smart Programs and APTIM’s Bid

APTIM, as TPA, will be required to design, implement, deliver and administer the Energy Smart Programs below.

The programs that APTIM has been selected to implement are as follows:

Energy Efficiency Programs

- Home Performance with Energy Star (“HPwES”)
- Multifamily Solutions
- Multifamily Solutions Income Qualified
- AC Solutions
- AC Solutions Income Qualified
- RetailAppliances
- Retail Appliances Income Qualified
- Outreach
- Income Qualified Weatherization
- Neighborhood-Based Delivery Program
- Large Commercial & Industrial Solutions
- Small Commercial & Industrial Solutions
- Schools and Universities
- Coolsaver

Demand Response Programs

- Residential Peak Time Rebate

Additionally, in its role as TPA for Energy Smart, APTIM shall be responsible for development, oversight and execution of all programmatic and project management related functions necessary to effectively implement, deliver and administer the programs set-forth in the plan. These major areas of responsibilities are defined in the Scope of Work section of the ENO RFP. These responsibilities shall include, but not be limited to the following:

- Program Design, Implementation and Delivery;
- Marketing;
- Data Management and Tracking;
- Quality Assurance and Control (“QA/QC”);
- Program Evaluation and Interaction with the TPE; and
- General Administration, Funds Management

B. Basis for Selection

APTIM’s proposal submission included a well-designed program, implementation, and delivery strategy that contained plans to enhance the current programs. APTIM has an established local New Orleans office with a significant presence in Louisiana and specific expertise in administering southern climate demand side management programs. In addition, the selected bidder clearly demonstrated in its proposal an understanding of customer needs, the local contractor market and local building stock.

As the Energy Smart TPA since 2017, Aptim has delivered award-winning programs despite navigating through the effects of the Covid pandemic and Hurricane Ida. Additionally, APTIM

has a successful track record with programs similar to those required in the Energy Smart plan in Wisconsin, at Duke Energy, and AEP.

Key components of the selected bid include:

- Recognized as one of the nation's leading energy management service providers.
- Partnering with industry-recognized subcontractors:
 - Franklin Energy is also recognized as an industry leader with residential energy efficiency program implementation as its core business.
 - Bidgely uses complex disaggregation algorithms and AMI data to provide Behavioral program participants more detailed information and tips. Bidgely has implemented successful programs in Washington, Idaho and Nevada.
 - EnergyHub has deployed over 60 BYOD programs across the country, representing a portfolio of over 2,900 MW of DERs under management, the most in the industry.
- 25% of implementation costs are at-risk
- Partnerships are New Orleans based:
 - Subcontractors
 - Non-Profits
 - Trade Associations
 - Universities
- Detailed plan to recruit and train participating local contractors.
- Detailed training process for contractors.
- Prepared to roll out new programs following contract execution and implementation plan approval.
- Addressed the importance of customer satisfaction and stakeholder involvement throughout the proposal.
 - Provided a customer dispute resolution process.
 - Provided training and corrective action plan for local contractors.
- A portion of the TPA's compensation is tied to their performance.
 - Performance metrics based on kWh savings and customer satisfaction metrics.
 - 25% of implementation costs are at-risk
- Proven Data Management/Tracking system allows for more rapid program roll out.
- Proposal is for a comprehensive set of programs
- Proven ability to deliver award-winning energy efficiency programs

- APTIM has won awards with its Wisconsin Energy program
- Proposed costs are in-line with other bidders
- Financially sound company with a track record of success in business ventures
- Desire to involve stakeholders through the administration of a stakeholder advisory panel

IV. Schoolkits and Education Program

A. Details of National Theater for Children's Bid

National Theater for Children ("NTC") submitted a proposal to handle the Schoolkits Program for the Energy Smart programs for the time period, January 2026 – December 2028. The proposed Schoolkits Program represents a change to the current schoolkits program. The responsibilities of the Implementer include, but are not limited to:

- Developing and executing a Schoolkits program to help New Orleans students learn about energy efficiency and become more energy efficient;
- Provide students with energy efficiency kits and track the associated kWh;
- Deliver educational performances; and
- Providing regular reports on the progress of the program.

B. Basis for Selection

NTC has successfully implemented Energy Smart's schoolkits program since January 2023. NTC has received praise from not only the participating schools, but also earned national recognition receiving the Association of Energy Service Professionals ("AESP") Award for Marketing and Customer Experience in the Energy Smart Energy Academy Program. NTC has also implemented proven schoolkits programs in Texas, Arkansas, Oklahoma, Pennsylvania, North Carolina, South Carolina, and other parts of Louisiana.

Key Components of NTC's bid:

- Innovative program design that includes live theatrical performances.
- Proven record of successful programs
- Marketing campaign that includes email, direct mail, and social media campaigns
- Familiarity with local stakeholders.

V. Bring Your Own Electric Vehicle Charger (“BYOC”), Bring Your Own Thermostat (“BYOT”), and Battery Energy System Storage (“BESS”), Demand Response Programs

A. Details of EnergyHub’s Bid

EnergyHub submitted a proposal to implement ENO’s BYOC, BYOT and BESS programs for the Energy Smart program for the time period, January 2026 – December 2028.

BYOC

The proposed BYOC program’s purpose will be to incentivize electric vehicle owners to charge their vehicles at off-peak times. The responsibilities of the Implementer include, but are not limited to:

- Developing and executing a program to help incentivize New Orleans residents charge their electric vehicles at off-peak times;
- Recruiting and compensating program participants; and
- Providing regular reports on the progress of the program;

BYOT

The proposed BYOC program’s purpose will be to incentivize smart thermostat owners to allow ENO to control their thermostat during periods of peak demand. The responsibilities of the Implementer include, but are not limited to:

- Working with smart thermostat manufacturers to recruit participants to the program;
- Maintaining the Distributed Energy Resource Management System (“DERMS”) that will control the participating thermostats during events; and
- Compensating program participants

BESS

The proposed BESS program’s purpose will be to incentivize battery owners to allow ENO to discharge their batteries during periods of peak demand. The responsibilities of the Implementer include, but are not limited to:

- Working with battery manufacturers to recruit participants to the program;
- Maintaining the Distributed Energy Resource Management System (“DERMS”) that will control the participating thermostats during events; and
- Compensating program participants

B. Basis for Selection

EnergyHub has been a part of the team that has implemented ENO’s BYOT program since 2020, as well as the BESS program since 2024. In addition to its work with ENO, EnergyHub has implemented more than 100 Bring Your Own Device programs across North Americas.

Key Components of EnergyHub's bid:

- Demonstrated ability to implement BESS, BYOT, and BYOC programs;
- Proven record of successful programs that have been evaluated by a third party evaluator;
- Ability to utilize AMI data, thermostat data, battery system data and telematics in the respective programs to monitor compliance;
- Proven relationship with Original Equipment Manufacturers (OEMs);
- Proven ability to enroll participants quickly

VI. Large Commercial Automated Demand Response Program

A. Details of Honeywell's Bid

Honeywell submitted a proposal to implement a large commercial ADR program for the Energy Smart program for the time period January 1, 2026 – December 31, 2028. The proposed ADR program's purpose will be to continue to incentivize large commercial customers to reduce their demand during peak times. The responsibilities of the implementer include, but are not limited to:

- Developing and executing a program to help incentivize large commercial customers to reduce their usage during peak times;
- Recruit and compensate program participants; and
- Providing regular reports on the progress of the program;

B. Basis for Selection

As current program implementer, Honeywell continues to grow the ADR program. Though it has taken a while to gather momentum, ADR program participation has steadily increased in recent years. Honeywell has implemented successful programs internationally and in the United States including Connecticut, Virginia and North Carolina.

Key Components of Honeywell's bid:

- Demonstrated ability to implement turnkey ADR programs around the world.
- Proven record of successful programs having been evaluated by a third party evaluator.
- Sitetracker for the tracking and reporting of all program activities and results from the C&I ADR program. Sitetracker is a flexible software solution that can support a wide variety of program types by tracking activities across the full lifecycle of program participation.
- Plan to acquire approximately new 3.5MW over the next three program years.

VII. Behavioral Program

A. Details of Bidgely's Bid

Bidgely submitted a proposal to implement the Behavioral Program for the Energy Smart programs for the time period, January 1, 2026 – December 31, 2028. The proposed Behavioral program will distribute printed and digital Home Energy Reports (“HERs”) with energy efficiency tips to ENO customers throughout the year. Bidgely is projecting to save approximately 38,000 MWh over the three-year period. Bidgely’s responsibilities will include, but not be limited to:

- Structuring treatment and control groups for the program;
- Providing digital HERs to customers monthly and printed HERs to customers quarterly
- Disaggregating and analyzing customer usage to provide useful energy efficiency tips

B. Basis for Selection

Bidgely offers a “best in class” solution for Behavioral programs. Their programs won multiple awards in 2024 alone. Bidgely also offers other products, such as a customer portal, that may be paired with the HERs reports in the future.

Key components of the bid include:

- A superior disaggregation model that allows for more detailed analysis of energy usage;
- Proven success in achieving kWh savings

VIII. Third Party Evaluator Selection

A. Details of Tetra Tech's Bid

Tetra Tech submitted a proposal to handle the Evaluation Measurement & Verification (“EM&V”) services for the Energy Smart programs for the time period January 1, 2026 - December 31, 2028. These responsibilities include, but are not limited to:

- Developing both impact and process evaluations annually;
- Updating the New Orleans Technical Reference Manual;
- Performing Field Audits; and
- Measurement and Valuation Support Services

B. Basis for Selection

Tetra Tech submitted a detailed and comprehensive proposal which covered Energy Smart's EM&V requirements. Tetra Tech provided detailed plans for their approach to impact and process evaluation.

Key components of the selected bid include:

- Familiarity with the Louisiana climate and energy efficiency environment, having performed EM&V throughout the state of Louisiana, but outside of New Orleans.
- Proven record of evaluations in many states including Louisiana, Arkansas, Mississippi, Texas, et al.
- Proven ability to provide regulatory support for filings.
- Innovative approaches to maximize the EM&V work effort while reducing redundant EM&V costs by moving to bi-annual impact evaluations of certain programs.
- Established connection with a local Louisiana contractor to handle field audits.

IX. Conclusion

ENO has evaluated the responses to the RFP based on the criteria established and set forth in the RFP to determine the most cost-effective and qualified respondents, as directed by Council Resolution. Consistent with these requirements, ENO has selected Aptim, NTC, Bidgely, EnergyHub, and Honeywell to serve as TPAs, and Tetra Tech to serve as the TPE. Accordingly, ENO respectfully requests that the Council assent to the selections of Aptim, NTC, Bidgely, EnergyHub, Honeywell, and Tetra Tech.

**BEFORE THE
COUNCIL OF THE CITY OF NEW ORLEANS**

In Re: 2024 TRIENNIAL)	
INTEGRATED RESOURCE PLAN OF)	
ENTERGY NEW ORLEANS, LLC)	DOCKET NO. UD-23-01
)	
)	

**ENTERGY NEW ORLEANS, LLC’S RESPONSE TO COMMENTS OF THE
ALLIANCE FOR AFFORDABLE ENERGY REGARDING THE ENERGY SMART
PROGRAM YEAR 16-18 IMPLEMENTATION PLAN**

Entergy New Orleans, LLC (“ENO” or “the Company”) respectfully submits Reply Comments in compliance with the requirements of Resolution No. R-25-406 (“Resolution”) which was adopted by the Council of the City of New Orleans (the “Council”) on July 24, 2025. The Alliance for Affordable Energy (the “Alliance”) filed the only set of Intervenor Comments regarding the Energy Smart Program Year 16-18 Implementation Plan (the “Plan”). ENO appreciates the opportunity to provide these Reply Comments.

BACKGROUND

On June 16, 2025, ENO submitted the Plan for review and approval by the Council. The Council subsequently approved the Resolution setting forth a procedural schedule that allowed for comments on the Plan to be submitted by August 26, 2025, and for Reply Comments to be submitted by September 12, 2025. Per the Resolution, the Alliance submitted comments on the Plan, and ENO now responds to those comments.

RESPONSE TO INTERVENOR COMMENTS

I. Scenario Selection

In its comments, the Alliance recommends that “the Council select and approve the 2% energy savings scenario for the PY16 to PY18 program cycle.”¹ Further, the Alliance asserts, “the 2% scenario is more cost-effective than the Reduced Savings scenario using both the societal and WACC discount rates, provides greater aggregate benefits to customers, and will provide greater opportunities for customers to manage unaffordable energy bills.”² While this assertion is valid, the Alliance neglects to mention that the 2% scenario comes at a significantly higher cost. Over the three-year period, the Reduced Savings scenario saves over \$20 million in program costs compared to the 2% scenario, while still garnering nearly 280 million kWh in energy savings and addressing Council priorities such as increased focus on programs for low-income customers and demand response. The projected kWh savings in PY18 under the Reduced Savings scenario is still 1.7% of total annual sales, a target that is significantly higher than most states in the region.

II. Approval of Proposed Programs

Regarding approval of the proposed Energy Smart programs, the Alliance recommends that the Council approve all of the programs proposed by ENO for all years of the PY16-PY18 plan with adjustments, as noted below followed by ENO’s responses.

¹ Comments of the Alliance for Affordable Energy on the Advisors’ Report Regarding the Entergy New Orleans, LLC 2024 Integrated Resource Plan and Entergy New Orleans, LLC’s Application for Approval of the Implementation Plan for Program Years 16 Through 18 of the Energy Smart Program at pg. 6, Docket No. UD-23-01, August 26, 2025.

² *Id.*

a. The Alliance proposes that the Council reject the Company's proposed Battery Storage Pilot program pending its determinations in Docket No. UD-24-02.

ENO recommends approving the proposed Battery Energy Storage System ("BESS") Pilot program under Energy Smart. The proposed BESS program is a continuation of the pilot program that has been part of the Energy Smart program for three years. During those three years, ENO has learned about running battery energy storage system programs that will prove invaluable as the program continues to grow. The current phase of the BESS program has 121 participants; ENO estimates that number represents approximately 30% of the population that owns batteries in the New Orleans area. The proposed program is a natural progression that adds upfront incentives for the purchase of batteries to the incentives for ongoing participation as a demand response resource. ENO has discussed potentially growing the BESS pilot to a third phase for several years, dating back to its *Report Regarding Phase One of the Battery Storage Demand Response Pilot Program and Application for Approval of Phase Two*³. ENO stated, "[b]ased on the experience from Phase One and feedback from EnergyHub described above, the Company anticipates that upfront utility incentives may be necessary to spur broader adoption of battery systems among residential customers (including low-to-moderate ("LMI") customers) and small commercial customers."⁴ Additionally, "[t]he Company will further consider ways to expand the BESS program to multi-family and LMI housing customers in a subsequent Phase Three."⁵ ENO believes that the time is ripe to begin Phase Three in PY16, appropriately under the Energy Smart umbrella. Further, ENO believes that removing the BESS program approval from the consideration of Energy Smart as a whole could lead to delays in program approval which could

³ *Report Regarding Phase One of the Battery Storage Demand Response Pilot Program and Application for Approval of Phase Two*, Docket No. UD-22-03, December 1, 2023.

⁴ *Id.* at pg. 8

⁵ *Id.*

cause delays in program implementation in 2026.

Since ENO filed its Plan on June 16, 2025, federal legislative changes that will likely affect participation in the BESS program have been approved. The sunset provisions for federal tax credits for solar photovoltaic ("PV") systems contained in the Big Beautiful Bill are expected to substantively reduce the number of new residential solar PV systems added to the New Orleans area annually, while providing a greater near-term opportunity in the commercial customer class. As a result, ENO anticipates that the projected number of battery systems that will be connected to new solar PV systems will be lower than originally projected in the Plan filing. In direct response to the federal tax credit reductions, ENO has increased incentive levels for the residential customer class while reducing the expected number of installations. ENO believes the new incentive levels are high enough to encourage adoption without being excessive. ENO has also incorporated meaningful incentives for small commercial customers to help support the adoption of BESS while full solar and storage federal tax credits remain available through 2027. As a result, ENO's modified plan represents an overall reduction in the BESS program budget versus what was previously filed in the Plan while still offering incentives expected to drive meaningful uptake among residential and commercial customers. Please find the amended plan attached in Appendix 1.

b. The Alliance suggests that "ENO should modestly increase its BYOT participation, savings, and budget projections for PY16-PY18 to reflect steady year-over-year growth from the PY15 plan forecast."

ENO and EnergyHub reviewed the BYOT program proposal and have determined that raising the incentive level in the BYOT program should have the effect of increasing participation. As such, ENO has revised the projected participation and cost estimates as illustrated in Appendix 2.

In addition, ENO and EnergyHub anticipate that new Electric Vehicle (“EV”) OEM integrations and advancements in EV OEMs’ ability to support partner marketing will enable the Energy Smart team to acquire higher participation levels in the Electric Vehicle Charging program. Revised estimates are also included in Appendix 2. Revised summation tables for both scenarios are also included as Appendices 3a-3f.

- c. The Alliance suggests that “ENO should continue and expand its workforce development efforts as needed to achieve its increased low-income weatherization participation projections. If not already embedded in program budgets, ENO should include additional budget to support this effort.”**

The Plan already contains funding for continued workforce development under Energy Smart.

III. Approval Timeline

ENO agrees with the Alliance’s assertion that “[t]he Council should take action quickly (before the end of October 2025) in order to ensure workforce and momentum is retained, in order to alleviate challenges from prior years that have hindered success in C&I and residential programs.”

IV. Incorporation of Benchmarking Ordinance Compliance

In their comments about the Implementation Plan, the Alliance recommends that ENO expand C&I incentives to encourage adoption of, and compliance with, benchmarking. The current Implementation Plan proposal includes funding for C&I initiatives that will encourage and support projects that may result from benchmarking compliance. The Energy Smart staff plans to collaborate with the Office of Resilience and Sustainability (“ORS”) and other stakeholders to support implementation of the requirements set forth in the Benchmarking Ordinance.

V. CONCLUSION

In summary, ENO finds the following with respect to the Alliance's comments:

- ENO recommends that the Council approve the "Reduced Savings" scenario which targets significant savings at a reduced cost;
- ENO recommends that the Council approve all of the programs proposed in the reduced Savings scenario with the adjustments herein, including the BESS program proposal;
- ENO requests that the Council approve the Plan prior to the end of October 2025 for the above-stated reasons; and
- ENO will work with ORS and other stakeholders to support the Benchmarking Ordinance.

ENO appreciates the opportunity to file these Reply Comments and the continued, collaborative efforts of the Council, its Advisors, Intervenors, and other stakeholders that resulted in this PY16-18 Energy Smart Implementation Plan.

Respectfully submitted,

By: 

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**ATTORNEYS FOR
ENTERGY NEW ORLEANS, LLC**

APPENDIX 1

	Incentive per Installed kWh	Maximum Installed kWh (per account/customer)	Maximum Upfront Incentive (per account/customer)	Expected Annual No. Battery Installations	Total Upfront Incentives (\$/Year)	Total Installed kWh	Total kW*	Total MW*
BESS Retrofit/New - Residential (LMI)	\$ 600.00	13.5	\$ 8,100	50	\$ 405,000	675	337.50	0.34
BESS Retrofit/New - Residential	\$ 300.00	13.5	\$ 4,050	100	\$ 405,000	1,350	675.00	0.68
BESS Small Commercial (2026 & 2027)	\$ 600.00	135	\$ 81,000	30	\$ 2,430,000	4,050	2,025.00	2.025
Year 1 Upfront Total					\$ 3,240,000	6,075	3,037.50	3.04
Year 2 Upfront Total					\$ 3,240,000	6,075	3,037.50	3.04
Year 3 Upfront Total					\$ 810,000	2,025	1,012.50	1.01
			Program Total		\$ 7,290,000	14,175	7,087.50	7.09

* The capacity figures in this table assume a two-hour duration battery. MISO capacity accreditation rules would result in a different amount.

** "Upfront" incentive intended for the purchase of batteries

Year 1 (2026) Participation Incentive Total	Total
Resi (\$600/Year)	\$ 90,000
Small Commercial (\$1,800/Year)	\$ 54,000
Existing Participants	\$ 100,000
	\$ 244,000
Year 2 (2027) Participation Incentive Total	
Resi	\$ 180,000
Small Commercial	\$ 108,000
Existing Participants	\$ 100,000
	\$ 388,000
Year 3 (2028) Participation Incentive Total	
Resi	\$ 270,000
Small Commercial	\$ 108,000
Existing Participants	\$ 100,000
	\$ 478,000

Administration (3 Year Estimate)	\$ 979,400
Revised Proposal (9/12/2025) Total	\$ 9,379,400

Energy Smart Filed (06/16/2025) BESS Budget 26-28	\$10.2M
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APPENDIX 2

June 16, 2025 Implementation Plan				
Program		Participants	Estimated Gross Demand Savings (MW)	Program Cost (excl. EM&V)
BYOT	Program Year 16	10,700	10.7	\$ 869,500
	Program Year 17	12,100	12.1	\$ 971,100
	Program Year 18	13,600	13.6	\$ 1,081,700
EV Charging	Program Year 16	161	0.08	\$ 167,710
	Program Year 17	229	0.11	\$ 167,140
	Program Year 18	317	0.16	\$ 173,420

September 12, 2025 Adjustments				
Program		Participants	Estimated Gross Demand Savings (MW)	Program Cost (excl. EM&V)
BYOT	Program Year 16	11,800	11.8	\$ 1,018,000
	Program Year 17	13,700	13.7	\$ 1,106,200
	Program Year 18	15,400	15.4	\$ 1,208,300
EV Charging	Program Year 16	279	0.14	\$ 180,690
	Program Year 17	369	0.18	\$ 176,640
	Program Year 18	481	0.24	\$ 184,460

APPENDIX 3a

Program Year 16 - Reduced Savings			
Energy Efficiency Program	Program Cost	kWh	kW
Small Commercial Solutions	\$2,960,812	8,663,401	364
Large C&I Solutions	\$6,287,803	27,688,655	1,926
Schools and Universities	\$1,587,319	5,333,795	195
CoolSaver	\$856,629	4,549,095	1,403
Home Performance with Energy Star ("HPwES")	\$2,823,972	4,163,898	1,669
Retail Appliances	\$871,831	1,312,343	11
Multifamily Solutions	\$1,297,316	2,956,756	39
Income Qualified Weatherization	\$3,730,545	5,076,114	37
A/C Solutions	\$1,436,551	2,755,859	1,887
Residential HVAC Midstream	\$1,636,937	2,047,121	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$757,981	13,048,000	-
Multifamily Solutions - Income Qualified	\$1,093,438	3,002,393	44
Neighborhood-Based Delivery Pilot	\$3,432,519	4,422,565	32
A/C Solutions - Income Qualified	\$808,840	2,699,687	1,864
Energy Efficiency Subtotal	\$29,966,627	88,242,694	9,470
Demand Response Program	Program Cost	kWh	kW
Battery Energy Storage System ("BESS")	\$3,969,363	-	3,638
Residential - BYOT	\$1,060,451	-	11,800
Large C&I DR	\$2,571,707	-	18,000
Bring Your Own Charger (BYOC) Pilot	\$188,225	-	140
Demand Response Subtotal	\$7,789,746		
TOTAL	\$37,756,373	88,242,694	33,578

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$9,065,342	15,200,759	\$634,574	\$ 1,256,951
Non-income Qualified Total	\$20,901,285	73,041,935	\$1,463,090	\$ 6,039,838

	Cost	kW
Demand Response Total	\$7,789,746	33,578

APPENDIX 3b

Program Year 17 - Reduced Savings			
Energy Efficiency Program	Program Cost	kWh	kW
Small Commercial Solutions	\$2,931,236	8,901,994	374
Large C&I Solutions	\$6,298,468	28,503,027	1,983
Schools and Universities	\$1,649,305	5,490,671	200
CoolSaver	\$944,429	4,682,892	1,444
Home Performance with Energy Star ("HPwES")	\$3,153,636	4,664,318	1,870
Retail Appliances	\$876,544	1,312,343	11
Multifamily Solutions	\$1,622,387	4,086,718	39
Income Qualified Weatherization	\$4,657,573	6,402,990	46
A/C Solutions	\$1,384,724	2,840,840	1,967
Residential HVAC Midstream	\$1,636,937	2,047,121	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$597,107	13,041,000	-
Multifamily Solutions - Income Qualified	\$1,311,007	3,347,165	49
Neighborhood-Based Delivery Pilot	\$3,816,975	4,909,048	35
A/C Solutions - Income Qualified	\$865,624	2,812,513	1,940
Energy Efficiency Subtotal	\$32,130,086	93,565,652	9,959
Demand Response Program	Program Cost	kWh	kW
Battery Energy Storage System ("BESS")	\$4,119,368	-	6,675
Residential - BYOT	\$1,152,329	-	13,700
Large C&I DR	\$3,104,420	-	21,500
Bring Your Own Charger (BYOC) Pilot	\$184,006	-	180
Demand Response Subtotal	\$8,560,123		
TOTAL	\$40,690,209	93,565,652	42,055

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$10,651,179	17,471,716	\$745,583	\$ 1,444,736
Non-income Qualified Total	\$21,478,907	76,093,936	\$1,503,523	\$ 6,292,208

	Cost	kW
Demand Response Total	\$8,560,123	42,055

APPENDIX 3c

Program Year 18 - Reduced Savings			
Energy Efficiency Program	Program Cost	kWh	kW
Small Commercial Solutions	\$3,081,952	9,184,075	385
Large C&I Solutions	\$6,731,205	29,317,400	2,040
Schools and Universities	\$1,716,948	5,647,547	206
CoolSaver	\$1,046,049	4,816,689	1,485
Home Performance with Energy Star ("HPwES")	\$3,574,194	5,313,524	2,130
Retail Appliances	\$983,793	1,541,342	11
Multifamily Solutions	\$1,769,782	4,530,509	44
Income Qualified Weatherization	\$5,135,509	7,062,616	51
A/C Solutions	\$1,492,198	3,472,960	2,334
Residential HVAC Midstream	\$1,636,937	2,047,121	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$590,111	11,997,000	-
Multifamily Solutions - Income Qualified	\$1,530,620	3,785,915	54
Neighborhood-Based Delivery Pilot	\$4,353,873	5,439,756	39
A/C Solutions - Income Qualified	\$981,965	3,178,145	2,166
Energy Efficiency Subtotal	\$35,009,270	97,857,611	10,946
Demand Response Program	Program Cost	kWh	kW
Battery Energy Storage System ("BESS")	\$1,681,790	-	7,688
Residential - BYOT	\$1,258,686	-	15,400
Large C&I DR	\$3,425,902	-	25,000
Bring Your Own Charger (BYOC) Pilot	\$192,152	-	240
Demand Response Subtotal	\$6,558,530		
TOTAL	\$41,567,800	97,857,611	48,328

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$12,001,967	19,466,432	\$840,138	\$ 1,609,679
Non-income Qualified Total	\$23,007,303	78,391,179	\$1,610,511	\$ 6,482,167

	Cost	kW
Demand Response Total	\$6,558,530	48,328

APPENDIX 3d

Program Year 16 - 2% Savings Scenario			
Energy Efficiency Program	Program Cost	kWh	kW
Small Commercial Solutions	\$4,271,000	15,035,485	631
Large C&I Solutions	\$8,499,618	41,671,426	2,899
Schools and Universities	\$2,036,305	8,027,361	293
CoolSaver	\$975,319	6,846,389	2,111
Home Performance with Energy Star ("HPwES")	\$3,048,082	4,730,188	1,896
Retail Appliances	\$936,234	1,490,821	12
Multifamily Solutions	\$1,388,617	3,358,875	44
Income Qualified Weatherization	\$5,757,780	8,038,455	58
A/C Solutions	\$1,502,959	3,130,656	2,144
Residential HVAC Midstream	\$1,762,626	2,325,529	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$757,981	13,048,000	-
Multifamily Solutions - Income Qualified	\$1,187,133	3,410,718	50
Neighborhood-Based Delivery Pilot	\$3,820,754	5,024,034	36
A/C Solutions - Income Qualified	\$877,486	3,066,845	2,118
Energy Efficiency Subtotal	\$37,206,027	119,727,794	12,292
Demand Response Program	Program Cost	kWh	kW
Battery Energy Storage System ("BESS")	\$3,969,363	-	3,638
Residential - BYOT	\$1,060,451	-	11,800
Large C&I DR	\$2,571,707	-	18,000
Bring Your Own Charger (BYOC) Pilot	\$188,225	-	140
Demand Response Subtotal	\$7,789,746		
TOTAL	\$44,995,773	119,727,794	33,578

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$11,643,153	19,540,053	\$815,021	\$ 1,615,767
Non-income Qualified Total	\$25,562,873	100,187,742	\$1,789,401	\$ 8,284,524

	Cost	kW
Demand Response Total	\$7,789,746	33,578

APPENDIX 3e

Program Year 17 - 2% Savings Scenario			
Energy Efficiency Program	Program Cost	kWh	kW
Small Commercial Solutions	\$3,961,587	13,904,224	584
Large C&I Solutions	\$7,812,072	38,536,093	2,681
Schools and Universities	\$1,970,552	7,423,387	271
CoolSaver	\$1,029,329	6,331,270	1,952
Home Performance with Energy Star ("HPwES")	\$3,476,862	5,457,252	2,188
Retail Appliances	\$957,047	1,535,441	12
Multifamily Solutions	\$1,785,986	4,781,460	45
Income Qualified Weatherization	\$6,933,009	9,831,363	71
A/C Solutions	\$1,470,413	3,323,783	2,301
Residential HVAC Midstream	\$1,794,048	2,395,131	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$597,107	13,041,000	-
Multifamily Solutions - Income Qualified	\$1,445,733	3,916,183	58
Neighborhood-Based Delivery Pilot	\$4,359,125	5,743,586	41
A/C Solutions - Income Qualified	\$953,857	3,290,640	2,270
Energy Efficiency Subtotal	38,930,860	120,033,825	12,475
Demand Response Program	Program Cost	kWh	kW
Battery Energy Storage System ("BESS")	\$4,119,368	-	6,675
Residential - BYOT	\$1,152,329	-	13,700
Large C&I DR	\$3,104,420	-	21,500
Bring Your Own Charger (BYOC) Pilot	\$184,006	-	180
Demand Response Subtotal	\$8,560,123		
TOTAL	\$47,490,983	120,033,825	42,055

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$13,691,724	22,781,772	\$958,421	\$ 1,883,825
Non-income Qualified Total	\$25,239,137	97,252,054	\$1,766,740	\$ 8,041,772

	Cost	kW
Demand Response Total	\$8,560,123	42,055

APPENDIX 3f

Program Year 18 - 2% Savings Scenario			
Energy Efficiency Program	Program Cost	kWh	kW
Small Commercial Solutions	\$4,015,506	13,635,072	572
Large C&I Solutions	\$8,071,434	37,790,128	2,629
Schools and Universities	\$1,989,006	7,279,689	266
CoolSaver	\$1,117,968	6,208,712	1,914
Home Performance with Energy Star ("HPwES")	\$3,942,112	6,190,256	2,481
Retail Appliances	\$1,080,835	1,795,664	12
Multifamily Solutions	\$1,950,077	5,278,043	52
Income Qualified Weatherization	\$7,429,772	10,562,192	76
A/C Solutions	\$1,593,495	4,045,998	2,719
Residential HVAC Midstream	\$1,789,427	2,384,896	-
School Kits & Education and Community Outreach	\$384,134	523,012	-
Behavioral	\$590,111	11,997,000	-
Multifamily Solutions - Income Qualified	\$1,684,395	4,410,590	63
Neighborhood-Based Delivery Pilot	\$4,957,651	6,337,315	46
A/C Solutions - Income Qualified	\$1,078,562	3,702,538	2,524
Energy Efficiency Subtotal	\$41,674,485	122,141,105	13,355
Demand Response Program	Program Cost	kWh	kW
Battery Energy Storage System ("BESS")	\$1,681,790	-	7,688
Residential - BYOT	\$1,258,686	-	15,400
Large C&I DR	\$3,425,902	-	25,000
Bring Your Own Charger (BYOC) Pilot	\$192,152	-	240
Demand Response Subtotal	\$6,558,530		
TOTAL	\$48,233,015	122,141,105	48,328

	Cost	kWh	UPI @ 100% of Goal	LCFC
Income-Qualified Total	\$15,150,380	25,012,636	\$1,060,527	\$ 2,068,295
Non-income Qualified Total	\$26,524,105	97,128,470	\$1,856,687	\$ 8,031,553

	Cost	kW
Demand Response Total	\$6,558,530	48,328

CERTIFICATE OF SERVICE
UD-23-01

I hereby certify that I have served the required number of copies of the foregoing pleading upon all other known parties of this proceeding individually and/or through their attorney of record or other duly designated individual.

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Leslie M. LaCoste