

Welcome 2024

RESIDENTIAL • HOME ENERGY EFFICIENCY & LOW INCOME WEATHERIZATION KICKOFF PRESENTATION

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2023 Program Overview

What's new in 2024?

2024 Program Budget & Dates

Program Changes

Inspections

Important Reminders and Updates

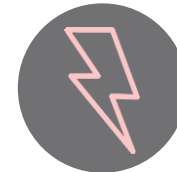
Agenda

2024 RESIDENTIAL KICKOFF PRESENTATION

2023 Program Overview

average kW

12,781



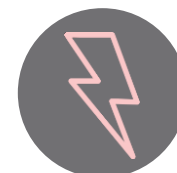
incentives paid

\$5.1M



average kWh

16,471,480



total projects

136



2023 LIW Overview

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average kW

0.5698



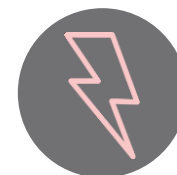
incentives paid

\$1,333



average kWh

991



total projects

2



2023 HEE Reserve Overview

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What's New in 2024?

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Ceiling Insulation

HEE Insulation Incentives-Flat Rate

HEATING TYPE	INCENTIVE PER SQ. FT.	AVERAGE INCENTIVE FOR A 1,500 SQ. FT. HOME
Electric resistance	\$0.30	\$450.00
Heat pump	\$0.26	\$390.00
Gas	\$0.20	\$300.00

Guidelines and Requirements:

- Incentives based on Sq. Ft. rather than existing insulation level (must report the existing insulation R-Value accurately)
- Existing insulation must be R22 or less
- Required to insulate up to R38

Ceiling Insulation

LIW Insulation Incentives-Flat Rate

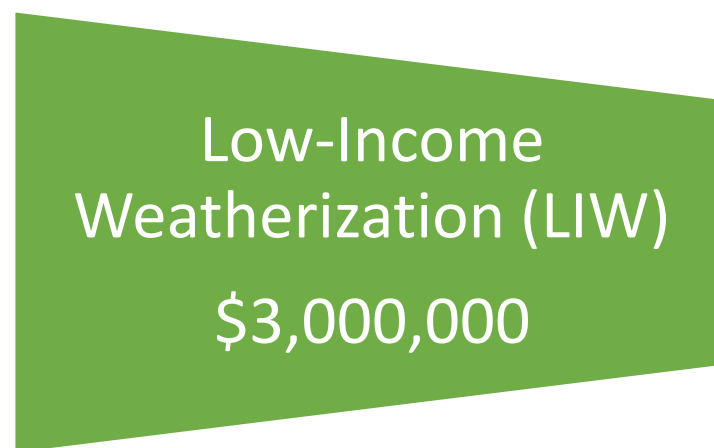
Heating Type	Incentive per Sq. Ft.	Average incentive for a 1,500 Sq. Ft. Home
Electric resistance	\$0.65	\$975.00
Heat pump	\$0.40	\$600.00
Gas	\$0.30	\$450.00

Guidelines and Requirements:

- Incentives based on Sq. Ft. rather than the existing insulation level (must report the existing insulation R-Value accurately)
- Existing insulation must be R22 or less
- Required to insulate up to R38
- Photo of the existing condenser unit, legible or not.
- Photo of the entire furnace indicating no flue or gas line exists if not reporting heating type Gas Furnace. Provide two photos if you are unable to capture the entire furnace in one.

2024 Program Budget & Dates

2024 Budget



Budgets will be adjusted as needed and based on demand.

Program Funding

- ❑ Tiers of \$5,000, \$15,000, and \$30,000 will be allotted based on prior year performance.
- ❑ Each SP meeting their milestone will receive their tier allocation amount at the beginning of each month (if funding is available).
- ❑ The milestone dates will be the first Monday of each month.
- ❑ Any SP not meeting their 90% milestone will lose their remaining funding and move to the next lower level of allocation.
- ❑ If the SP wants to continue in the program, they will be put in the next lower tier.
- ❑ If SP misses their milestone in the lowest allocation level, they can continue participating in the program at the Program Manager's discretion.

Residential Program Timeline

	Date	Event/Action
STEP 1	January 29	HEE & LIW Program Open for Applications
STEP 2	February 8	Oncor reviews all applications and determines funding tier level for each Program Option
STEP 3		Oncor contacts each SP via email with allotted funding level for each Program Option
STEP 4		HEE & LIW Program Open for PRs

NOTE: All SPs must submit a new application each year. Applications will be available through the SP EEPM dashboard. Before submitting applications, SPs should review emails, contacts, and phone numbers for current status.

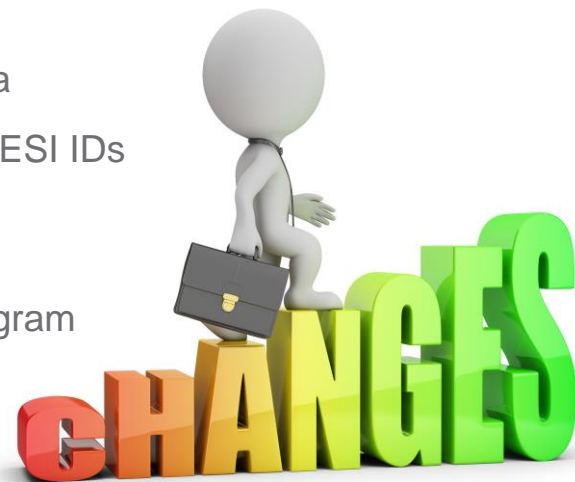
Any work or installations completed before the program opens on February 8th, will **NOT** be accepted.

Program Changes

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Program Changes

- 1) All failure types will have an attempt to have a correction made. If a correction is made, the approved incentive amount may differ from the requested amount.
- 2) Failures are calculated by a \$ dollar amount instead of a percentage amount. After three (3) failures, the Provider will be placed into lockout for 15 business days. Once the lockout period has been met, the provider will be unlocked, and funding allocation may be reduced.
- 3) Service Providers may now submit multiple projects per week with a maximum dollar amount of \$40K per PR. The maximum number of ESI IDs per Production Report is fifteen (15).
- 4) All Program funding, allocations, and lockout are subject to the Program Manager's discretion.



New Process for Failures

- Divide the failed measures' total dollar amount by the total production report (PR) incentive amount requested by the Service Provider to get a percentage of the failed dollar amount.
- The percentage of the failed dollar amount will be the percentage that will be used to reduce the incentive amount for failed and non-inspected measures.



Example of New Process for Failures

2023	
Total PR \$ Amount	\$20,000
Failure # 1	\$1,000
Failure # 2	\$1,000
Failure # 3	\$1,000
Failure # 4	\$1,000
Total \$ Failures	\$4,000
PR total less Failures	\$16,000
Failure % - Total Failures divided into total PR amount	20%

Uninspected Sites \$ Value	\$11,000
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Failure Reduction % applied to Uninspected Sites	\$2,200
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Passed sites	\$5,000
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Adjusted PR minus Failures and Failure % applied to Uninspected sites	\$13,800
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2024		
\$20,000	Fixed and Recalculated \$ incentive	Comments
\$1,000	\$1,000	Fixed and Recalculated
\$1,000	\$800	Fixed and Recalculated
\$1,000	\$850	Fixed and Recalculated
\$1,000	\$0	Not fixed
\$4,000	\$2,650	Total Fixed and Recalculated Failure \$
	\$18,650	Recalculated PR total less Failures
	6.75%	Failure % = Recalculated PR total divided into total PR amount

\$11,000	Uninspected Sites \$ Value
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\$179	Failure % Reduction applied to Total Fixed and Recalculated Failure(s)
\$743	Failure % Reduction applied to Uninspected Sites

\$5,000	Passed sites
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\$17,729	Adjusted PR minus Failures and Failure % applied to Uninspected sites
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- All failures will have an attempt to be fixed
- # of failures will be tracked rather than overall percentage
- Each failure can have one to multiple reasons that cause the each failure

Example of New Process for Failures

Program	# of Failures	Result
HEE	3 or more	15 business days lockout – No access to EEPM
LIW	3 or more	15 business days lockout – No access to EEPM

- Each failure can have one to multiple reasons that cause the failure within one measure
- One PR can have multiple failures
- The lockout period may be modified at the discretion of the Program Manager

Inspections

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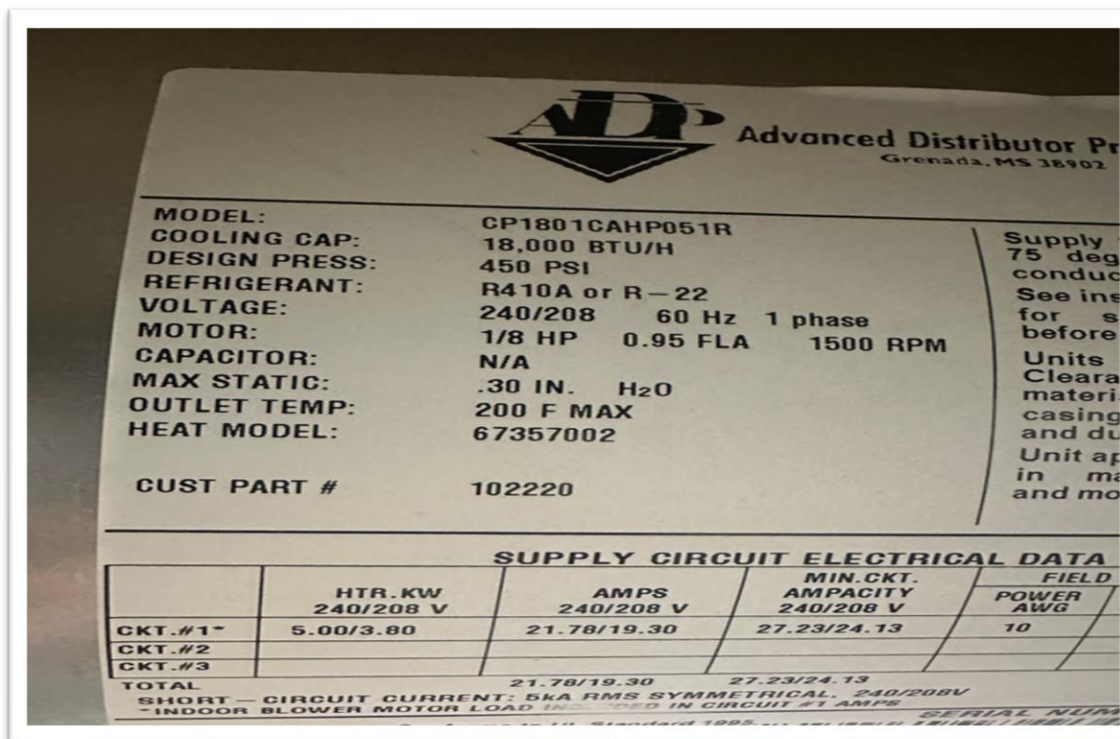
Multi-family Pre-inspections

- Multi-family Soffit or Fur-down Application above the bathtub
- Photos from only one apartment are required this year



Multi-family Pre-inspections

- Air handler (fan coil) for Multi-family Soffit or Fur-down Application
- Capture the label, including the model number if possible



Residential Ceiling Insulation


Required Documents and Photos

The following documents are required for all ESIIDs

- | | |
|---|---|
| 1 | Customer Agreement |
| 2 | Tenant Eligibility Certificate for LIW Only |
| 3 | Clear photo of the existing insulation level measurement for <u>each</u> measure reported. If reporting all three R-value ranges, (R5-R8 & R9-R14, and R15-R22) <u>3 photos are required</u> with the identification card including the address, date taken, reported R-Value. See example below: |



Ceiling Insulation (cont.)

4	<p>Clear photo of the entire attic prior to adding new insulation (existing insulation must be R22 or less). If the entire attic cannot be captured in one photo, please take multiple photos that represent the entire attic.</p>
	
5	<p>Clear photo of the new insulation measurement to identify the number of inches added (Required to insulate up to R38) with identification card of address and date taken.</p>
6	<p>Clear photo of the entire attic after the new insulation is installed (Required to insulate up to R38). If the entire attic cannot be captured in one photo, please take multiple photos that represents the entire attic.</p>
7	<p>Photo of the condenser ID label</p>
8	<p>Photo of the entire furnace indicating no flue or gas line exists if not reporting heating type Gas Furnace. Provide two photos if unable to capture the entire furnace in one.</p>

Existing Insulation

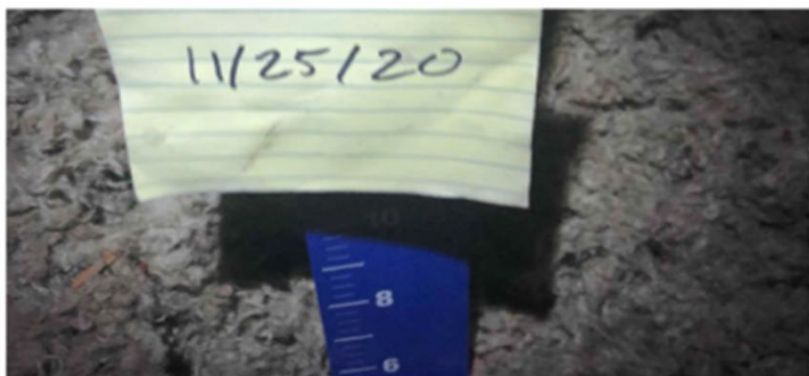
1. In this photo we are unable to determine the number of inches. ↓



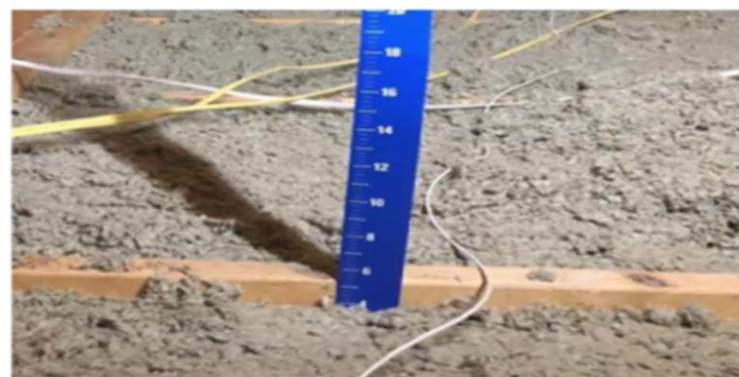
2. This is the correct angle to easily determine number of inches. ↓



3. Difficult determining the number of inches in this photo. ↓

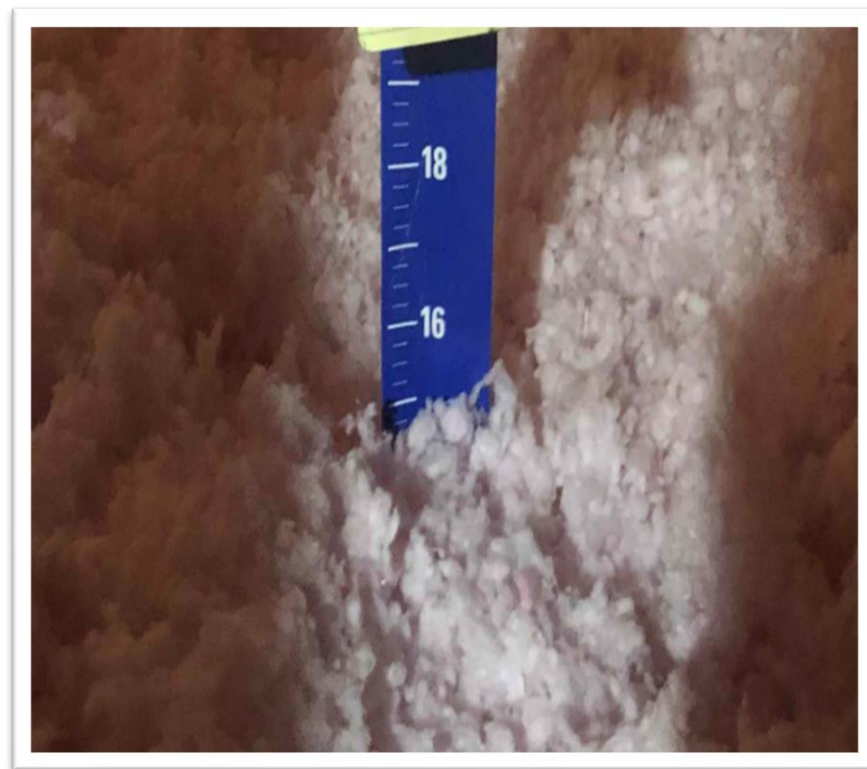


4. Try shooting eye level to depth rather than from above. ↓



New Insulation

Below are two good examples of new insulation photos that were taken correctly.



Attic wide-angle View

This is not a wide- angle view photo of an attic.

TIP: If an attic has limited space take several photos side-by-side.



Existing Insulation – Blurry Image

This photo is blurry at the bottom since the focus was on the top.

TIP: Focus on where the depth meets the ruler.



Attic-Limited Space

If space is limited, take several side-by-side photos. As seen in the illustration below.

Example:



Important Reminders

Paperwork

- No hard copies/paperwork required
- **All paperwork**, including the PR Summary, Customer Agreement (CA), and Income verification certificates, should be uploaded under “Attachments” for each Production Report
- **E-signature will be offered through an online app for the CA**
 - Customer and Provider will be able to sign CA electronically
 - Customer will need to receive a copy of the signed CA based on their preference
- **PR Summary will be e-signed and uploaded for each PR**

Residential & Multi-Family Survey

- Email addresses for customers are required
 - If the email address is not available, enter na@na.com
- “**Primary Language**” on the customer tab field should be populated (Example: English, Spanish, Vietnamese, or Other)

Customer Information

Leave a copy with each customer after work is completed!

- Customer Agreement (Electronic)
- Customer Disclosure Notice (Hard copy)
- Invoice from Service Provider
- Energy Efficiency (EE) Tips Brochure*
- **LIW ONLY - NEW** Income verification forms AND process for LIW SPs.



* The EE Tips brochure should be left with the customer, whether it is a sales call or an actual project.

LIW-Desk Review Requirements

Air Infiltration for LIW

- Customer Agreement
- Eligibility Certificate
- Residential Air Infiltration Description Document
- An iTEC report is required for all single-family locations. **Not required for Multifamily.**
- Photo of the condenser ID label.
- Photos of pre and post-manometer for ALL sites.
- Photos of all improved areas- pre- and post-photos side-by-side of each improvement.
- Photo of the entire furnace indicating no flue or gas line exists if not reporting heating type Gas Furnace.
Provide two photos if you are unable to capture the entire furnace in one.



Look-up tool for Income Validation

Oncor has selected the Easier Energy Efficiency Eligibility for Texas website www.e4-tx.com as its look-up tool for the Low-Income Weatherization Program’s verification source.

How to use the Look Up tool:

Visit www.e4-tx.com

Enter login:

- Username: oncorverify
- Password: oncorlowincomeverify


Once logged in follow the below steps:

Enter:

- “Address” and Meter #
- Residence Type
- Utility Co
- SP Name
- SP email

***Please note that these are REQUIRED fields.**

Address Verification



This geo-eligibility tool verifies addresses for LIW reserve program category 1C eligibility. Enter an address, meter number and your information below to verify eligibility and print a certificate of proof

* Address:

* Meter ID:

* Confirm Meter ID:

* Residence Type:

* Utility Company:

* Service Provider:

* Service Provider Email:

Customer Name:

Look up Tool-Income Validation (cont.)

Result

This Meter Address **Qualifies** For The LIW Reserve Program
 Category 1C: Eligibility Through Geographic Location:

1. It is **Outside Of** The HUD Texas QCTs Zone
2. It is **Within** The HUD Texas LMISD Zone
3. It is **Outside Of** The Opportunity Zone

Your unique report ID is:
031A980D-75AA-4C60-BDD3-7C9A12BB65EE

Please download the eligibility certificate by clicking "Print" and save the PDF file into your database to be included in the residence eligibility packet.

QCTs LMISD Both

Map showing addresses: 4105, 4107, 4109, 4111. A green dot is on 4109.

Results will produce a **“GREEN”** checkmark if the address Qualifies for the LIW Program.

A unique report ID will be created

A **“Print”** button is ready for accessing the required **“Certificate”**

Map validates the address and is available for looking at surrounding area

Look up Tool-Income Validation (cont.)

The screenshot displays a web interface for address validation. At the top, there is a 'Submit' button. Below it, a 'Result' section contains a large red circle with a white 'X' inside, indicating a failure. Below the icon, the text reads: 'This Meter Address **Does Not Qualify** For The LIW Reserve Program'. Underneath, it specifies 'Category 1C: Eligibility Through Geographic Location:' followed by three numbered reasons: '1. It Is **Outside** Of The HUD Texas QCTs Zone', '2. It Is **Outside** Of The HUD Texas LMISD Zone', and '3. It Is **Outside** Of The Opportunity Zone'. A legend below the text identifies 'QCTs' (pink), 'LMISD' (blue), and 'Both' (purple). The map below shows a street named 'Engleman St' with several house numbers: 013, 4017, 4021, 4025, 4029, 4033, and 40. A red arrow points from the 'Result' section to the text on the right, and an orange arrow points from the map to the text on the right. At the bottom of the interface, there is a '+ New Report' button.

Results will produce a **“RED” X** if the address Does Not Qualifies for the LIW Program.

There is NO “Print” button to access the required “Certificate”

Map available with the address and is available for looking at surrounding area and verifying the location

Look-up Tool Income-Validation (cont.)

Certificate from the “Print” button to be uploaded into EEPM



Approved!

This Meter Address Qualifies for the LIW Reserve Program
Category 1C: Eligibility through Geographic Location
Low- and Moderate-Income Data

Meter Address: 4109 Koala Dr, Killeen, TX, 76543, USA
Meter ID: 103993522LG
Service Provider: brown
Type of Residence: Single Family

ID: 031A980D-75AA-4C60-BDD3-7C9A12BB65EE
1/14/2022, 4:12:19 PM

SP Marketing Materials

2024 Marketing Activity

- Any and All marketing activity **MUST** be reviewed and approved by Oncor prior to use.
- Use of the Oncor logo is prohibited.
- **Acceptable marketing activity can include:**
 - Social media
 - TV and/or Radio
 - Postcards
 - Newspaper
 - Other print advertising



Service Providers can request a copy of the EE Marketing Toolkit for more marketing guidance and requirements.

Example: George's Energy Solutions is an approved participating service provider in Oncor's Low-Income Weatherization Program. Through this program, we are able to install energy efficiency upgrades to help our customers reduce energy consumption.

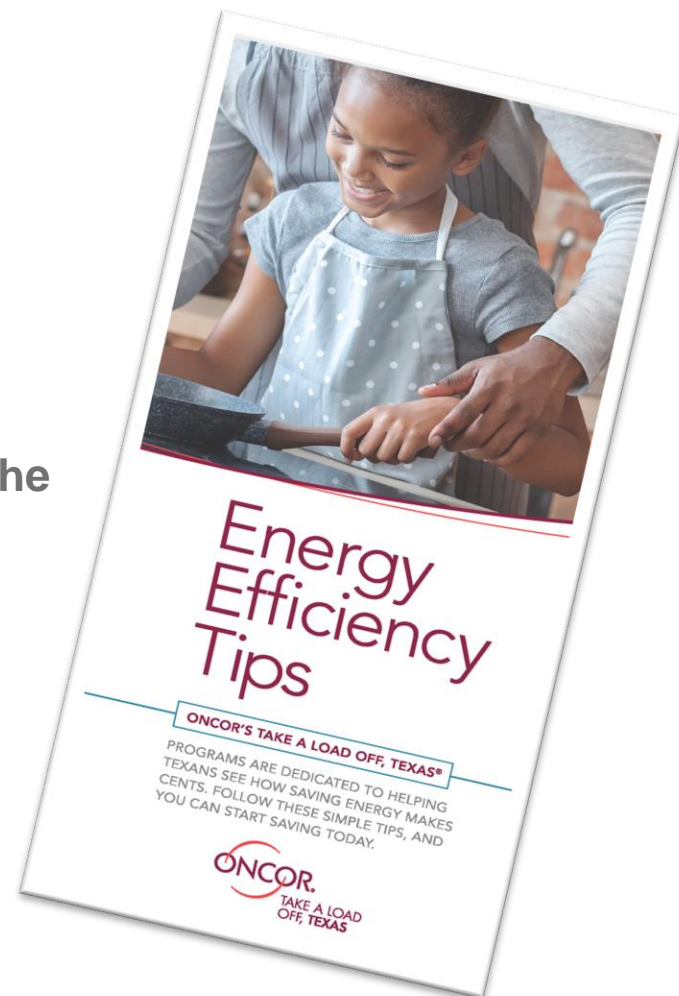
Energy Efficiency (EE) Tips Brochure

ORDERING MARKETING MATERIALS

Brochures can be ordered online in quantities of 200 brochures for \$28.50 per order or an English/Spanish combo pack of 300 brochures for \$28.50 per order.

ATTENTION: All SPs are REQUIRED to purchase the EE Tips brochure and leave it with the customer, whether its a sales call or an actual project.

To order, visit: [Oncor E-Store](#)



Final Takeaways....

- DO NOT start work until you are “Approved”.
- Keep insurance up to date throughout the ENTIRE year.
- If you change your company name or Tax ID, contact the Program Manager immediately.

Read the Program Manual.

- If you discover an error in submitted projects, contact the Program Manager immediately.
- Have a question? Call the Program Manager and ask before proceeding.

Contact Information

Who do I Contact?

Question	Program Manager	Inspection Manager	EETM Help Desk
Unusual situation at customer's house	✓		
How to create a PR			✓
Discuss/Dispute a Failure		✓	
Submit a "Duplicate Measure" request			✓
Request more funding	✓		
Insurance question			✓
Program feedback	✓		
Question about the Program	✓		

Program Manager

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EEPMsupport@oncor.com

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eepminsurance@oncor.com

Contact us!





thank you.
