Final Technical Report

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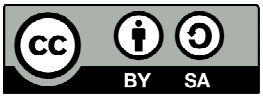

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1 Executive Summary

The reEnergize Program helped to build a market for residential and commercial energy evaluations and upgrades. The program provided incentives to encourage participants to save energy, save money, and make their homes and businesses more safe, healthy, and comfortable. As part of the Better Buildings Neighborhood Program (BBNP), the successful investment of this $10 million grant toward market development was the first grant funding collaboration between the cities of Omaha and Lincoln. Through more than three years of work, thousands of participants, contractors, and community members worked together to make the reEnergize Program a demonstration of how to "Build Energy Smart Communities."

Residential
Three major areas of needed market improvement were identified; skilled work force, financial mechanisms, and customer information. A wide variety of businesses, nonprofit organizations, and individuals pledged support toward achieving these objectives as Leverage Partners. Through multiple months of collaborative meetings, an initial program design was created as well as scope of work for program staff, consultants, and contractors. Participant contact, engagement, and facilitation included workshops with both contractors and early-adopter participants. As the Retrofit Ramp-Up transitioned into the BBNP, the reEnergize Program brand and quality of work standards began to be implemented.

A staged approach to program improvement every six months was planned to accommodate major improvements based on experience gained during early stages. Similar to the existing Weatherization Assistance Program (WAP) objectives, reEnergize was designed to provide the most cost-effective energy upgrades for each home. WAP average expenditures of around $6,500 were used as a guideline for expected total project cost to achieve the target 25% energy use reduction. Early participants were offered a flat cost of $3,500 to achieve energy savings from their comprehensive energy evaluation, with the reEnergize Program covering all additional expenses. This design and project completion numbers was built around an average $1,300 incentive per home over the entire program. Based on participants indicating a strong desire for a "simple" process, the program was designed to handle as many details as possible. Program coordination was found to be more involved than desired by participants or contractors, and project completion for early participants was limited.

In order to simplify the process and to encourage more contractor involvement, the initial process was streamlined and additional marketing and outreach opportunities were developed. This simplification was very successful at encouraging more direct interaction between the participant and contractors who became qualified based on training, quality, and incentive guidelines set by reEnergize. Contractors were very successful at

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demonstrating qualifications and selling services in the market with reEnergize incentives for the entire cost of the evaluation, and up to 50% of the cost for energy upgrades. reEnergize was initially focused on weatherization companies as the Upgrade Contractor and point of contact for the participant, but adapted to allow the large number of existing mechanical and other specialty contractors to complete energy-specific training and to oversee weatherization as an additional service. By providing comprehensive energy upgrades, homes that would otherwise have simply replaced equipment were also air sealed and insulated, lighting was improved, and a comprehensive upgrade approach was completed. Focusing on expanding an existing market, rather than developing and entire new market from scratch, was very successful at building a qualified workforce and engaging previously existing clients for energy upgrade services.

As contractors had increasing success with Market Rate participation, the need for increased grant fund investment rate, coupled with a realized lack of services for residents in the greatest need of assistance, led to the Low/Moderate Income path. Participants who met income qualification guidelines became eligible to pay $100 and receive up to $3,000 of the most cost-effective upgrades for their home. Word-of-mouth quickly spread the availability of this, and based on limited funding availability a “Waitlist” was initiated on November 20, 2012. The vast number of interested homes on the Waitlist represents a significant need for additional funding assistance for cost-effective upgrades as well as health and safety improvements to low income homes.

Residential upgrades in the reEnergize Program achieved very cost-effective energy savings while building the foundations for an ongoing new market. Training, experience, professional relationships, and a wide variety of other tools are now available for contractors looking to build a business, or home owners looking to save energy and save money.

Commercial

At the start of the reEnergize Program, the market for commercial energy efficiency was more developed than the residential market. New building standards and efficiency certifications, large potential financial savings, and equipment maintenance contracts all previously existed. reEnergize developed incentives for businesses and nonprofit organizations in three areas; evaluation and advising, lighting, or Roof Top Unit (RTU) controller upgrades.

Commercial energy evaluations were provided through competitive bidding, or sole-source contracting based on cost-effectiveness in dollars per square foot, and up to 3o hours of sustainability advising was provided to help with Green Checklists, Sustainability Action Plan, and financial considerations related to energy recommendations from the evaluation. Outreach was specifically targeted to small businesses or nonprofits that might not have a dedicated facility manager on staff.

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Lighting upgrades in commercial buildings can have an extremely rapid return on investment based on high annual hours of operation, and rapidly decreasing cost for LEDs and other efficient lighting technology. reEnergize partnered with OPPD to provide double-incentive for simple LED lighting upgrades which provided the highest energy return on investment (EROI) of any upgrades in the program. Contractors completed 84 projects with over $100,000 in annual energy savings and $10 of savings to the community for every grant dollar invested.

In an additional partnership with OPPD to reduce both peak load and kWh consumption, reEnergize provided a variable incentive to buy down the cost of RTU controller upgrades to a 1 year payback for participants. OPPD provided an addition 50% higher incentive for any reEnergize/OPPD partner projects, and 48 units were upgrade projecting over 685,000 kWh savings for local businesses. This partnership helped launch the OPPD program, train contractors for new installation techniques, and bring a new product into the commercial efficiency market.

Accomplishments

Investing grant funding toward incentives, training and experience, accelerating project completion rates, and customer awareness and engagement were key accomplishments of the reEnergize Program. Numbers accumulated from the entire program represent a majority of the investments, projects, and jobs, however in all areas additional activities are known to have been completed but not reported.

- $10,000,000 grant funding successfully invested toward market development
- 3,100 potential participants engaged
- 1,360 residential upgrades completed
- 168 commercial projects completed
- 66 annual FTE throughout the program

This report provides a summary of combined accomplishments form over three years of project completion and market development by hundreds of individuals. The reEnergize Program was designed to help “ramp up” the number of interested customers and contractors in the market, and by the program conclusion demand in all areas exceeded funding available for incentives.

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2 Program Design

2.1 Programmatic Aspects

In the beginning, the reEnergize Program was known as the Omaha-Lincoln Retrofit Ramp-up Program. This initial name was devised based on the original name of the grant, Retrofit Ramp-up. Shortly after the award announcements, the Department of Energy changed the name to first the Better Buildings Program and then the Better Buildings Neighborhood Program. Subsequently, the Omaha-Lincoln Retrofit Ramp-up Program was rebranded the reEnergize Program.

The significance of this brand change relates to the original intent of the reEnergize Program. The program was designed in a way to build a market at the macro-level by both forming a space for cross-collaboration of relevant organizations, establishing base standards for energy upgrade projects on existing homes, and utilizing incentives to test project delivery models. By viewing the market as a system and considering what was needed to strengthen specific components, the reEnergize Program sought to build the foundations for a whole-home energy upgrade market in Nebraska.

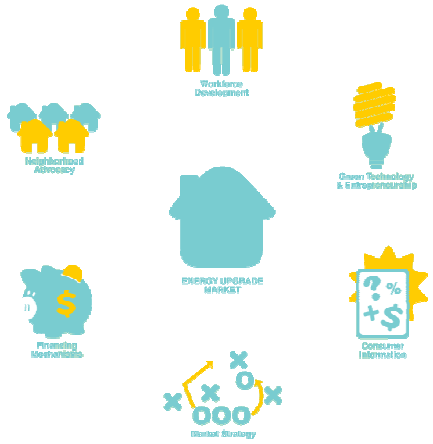
The following section shall describe the various system components, the involvement of community leverage partners, and the overall administrative structure of the reEnergize Program. It shall also provide an overview of the program design as it evolved over the course of the grant.

2.1.1 Building a Market

The reEnergize Program was designed to be a model for transforming an energy-efficiency evaluation and upgrade market in any region across the United States. With this goal in mind, the reEnergize Program increased the size and skill of the related workforce, raised citizen awareness, improved comfort in homes and commercial buildings, and developed sustainable financing opportunities for residents of all income levels.

Components identified as needing to be developed, or improved in order to have a successful energy upgrade market include:

- Workforce Development
- Green Technology & Entrepreneurship
- Customer Information
- Market Strategy
- Financing Mechanisms
- Neighborhood Advocacy



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2.1.2 Leverage Partners

In crafting the program design, several partnering organizations with specific interests tied to the success of an energy upgrade market in Omaha and Lincoln stepped forward as stakeholders. To be a "Leverage Partner", each organization was required to make a commitment to one or more of the component areas. These commitments were based on what the organizations were already doing and took the form of financial investments or in-kind donations of resources and time. For example, Metro Community College committed to delivering a training program for weatherization contractors through their workforce development grant program and several energy evaluators and contractors contributed their time and professional experience toward reviewing contract language and recommending qualified products.

After the grant was awarded, the Leverage Partners participated in intensive, almost daily sessions over the course of six weeks that delved into the opportunities and barriers associated with each component area. From these sessions, the original program design, including the workforce standards, contractual requirements, and project delivery process took shape.

Leverage Partner meetings occurred on a quarterly basis after the launch of the program in January 2011. At the Leverage Partner meetings, program staff discussed the status of the program and received feedback on implementation issues. In addition, a BaseCamp account was set up to allow Leverage Partners to exchange information related to their own programs and objectives. The Leverage Partner meetings successfully helped share information and extend relationships between organizations that might typically not interact.

Administratively capturing the true value of Leverage Partner commitments was more difficult than originally expected, as was addressing the various limitations placed on each partner's commitment.

Over time, the Leverage Partner sessions morphed to include more evaluators and contractors who were working directly on reEnergize projects. The sessions' focus also changed from vision-setting to issue resolution.

2.1.3 Program Administration

The City of Omaha's Office of Sustainable Development was the primary recipient of the Better Buildings Neighborhood Program grant. In this role, the City of Omaha was responsible for contracting support services, communicating with the Department of Energy, and overseeing the distribution of grant funds. The City of Omaha staffed the program with four primary positions: Program Director, Technical Program Coordinator, Marketing/Engagement Program Coordinator, and Financial Accountant. In addition, the City enlisted three interns over the course of the grant to support utility reporting and participant tracking.

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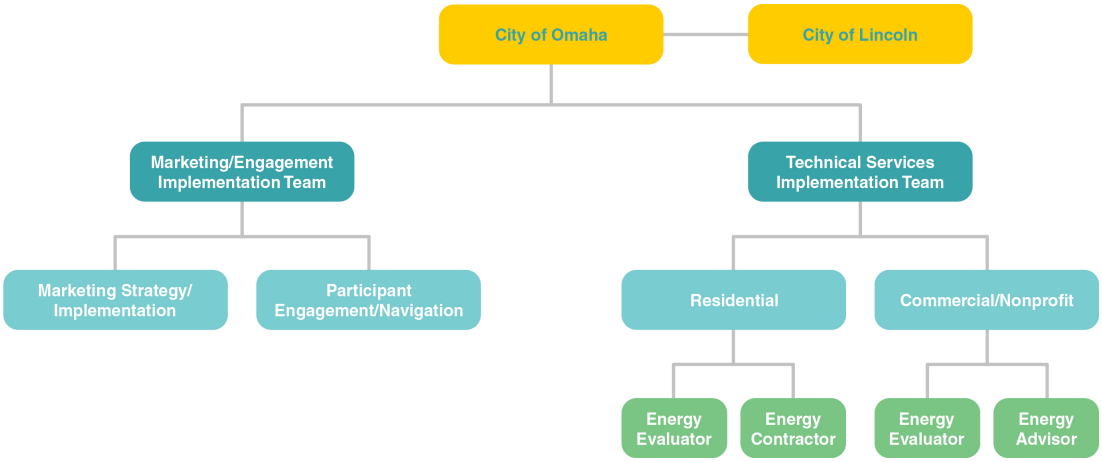
Omaha worked in collaboration with the City of Lincoln to oversee project implementation in their respective communities. The City of Lincoln focused their initial efforts on Marketing and Engagement and then, in January 2013, expanded their responsibility to include technical oversight of Lincoln projects. City of Lincoln staffing included a Program Director and two marketing specialists, in addition to a subcontracted Navigator position.



2.1.4 Implementation Teams

As part of a market building strategy, the City of Omaha contracted services with a number of generally local organizations to provide technical and marketing expertise for the reEnergize Program. These contractors were organized into implementation teams to support specific aspects of the program most relevant to their expertise. The teams formed included the Technical Services Implementation team, Marketing/Engagement Implementation team, and the Financing team.

2.1.4.1 Technical Services Implementation Team

The Technical Services Implementation (TSI) team was contracted through an Request for Proposal (RFP) and formal interview process. A panel of five people, including the City Engineer, representatives from each city, and a private citizen, reviewed the RFP submittals and scored the interviews for the top three finalists. Archi+etc LLC, in partnership with Ayars & Ayars Construction, Energy Pioneer Solutions, and ME Group, was selected as the TSI team provider in the fall of 2010.

The key requirements for the TSI team included direct experience in residential energy evaluations and contracting, as well as commercial engineering experience with industrial-grade energy audits. Initially, the TSI was responsible for managing the strategic delivery and day-to-day tasks of the program, including contracting project work. The TSI team, working with the Program Directors and Technical Program Coordinator, developed the project contract documents and designed an internal data/document management tool, called

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MegaTool, for collecting and tracking projects. The TSI team also managed evaluator and contractor qualifications and addressed quality assurance issues.

The TSI team met weekly via conference call over the course of the program. Each week, critical issues, like contractor behavior or unexpected situations, would be addressed and recommendations to act would be conveyed to the Program Administration. The TSI team was actively engaged in the day to day operations of the program, often serving as a neutral ombudsman when differences of opinion arose between evaluators, contractors, and participants.

2.1.4.2 Marketing/Engagement Implementation Team

The Marketing/Engagement Implementation (M/E) team was initially contracted through an Request for Proposal (RFP) and formal interview process. A panel of five people, including the City Engineer, representatives from each city, and a private citizen, reviewed the RFP submittals and scored the interviews for the top three finalists. A collaborative team consisting of HDR Engineering, Inc., What Cheer!, and Community Redesigned, was selected as the M/E team provider in the fall of 2010.

The key requirements for the M/E team included branding, direct community marketing experience, web tool development, and ability to engage, track, and manage participants through the process via Navigation techniques.

The initial M/E team led the rebranding effort, suggesting the name “reEnergize”, logo, and related graphics. They designed a website and initiated the first in-person orientation sessions with participants. They designed and tested the processes for Navigation of participants, essentially ushering participants through the process. However, despite this groundwork, the program experienced a significantly low sign-up rate during the first two quarters of 2011.

In mid-June 2011, the contract with the initial M/E team was terminated by the City of Omaha due to an inability to achieve consensus on necessary improvements to the program’s marketing and engagement efforts.

In July 2011, the City of Omaha contracted with the Neighborhood Center of Greater Omaha to provide Navigation services in Omaha. The Navigator developed a role for tracking participants and became the first point of contact for a participant with questions or in need of support. A full-time Marketing/Engagement Program Coordinator was hired by the City of Omaha to manage the tracking tools and coordinate marketing campaigns.

In December 2011, with the signing of an interlocal between the City of Omaha and the City of Lincoln, Lincoln began engaging and marketing in Lincoln. In addition, they subcontracted with NeighborWorks Lincoln to staff Navigation services for Lincoln’s participants.

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In March 2012, the City of Omaha contracted with Bozell, a marketing firm, to help develop a new campaign and branding toolkit to better engage people in Omaha and Lincoln. On behalf of the reEnergize Program, Bozell conducted a market analysis of likely reEnergize participants, launched the "Energy Thief" campaign, including posters and radio spots, and created a series of short videos describing energy upgrades and the reEnergize process. Beginning in second quarter of 2012, the program experienced a marked increase in sign-ups, leading to a five-fold increase in sign-ups during 2012, as compared to 2011.

2.1.4.3 Financing Team

The reEnergize Financing Team was formed in 2012, following several unsuccessful efforts to launch financing options in the Omaha and Lincoln markets. The reEnergize Program originally intended to utilize a Loan Loss Reserve to catalyze financing opportunities for residential participants. However, after outreach to most of the financial institutions and other stakeholders in the market, including the Nebraska Investment Finance Authority, it was determined that a Loan Loss Reserve would not be feasible as the institutions lacked confidence in the long-term viability and administration.

After trying to find a local solution for over a year, the reEnergize Program hired a financial strategy consultant, Harcourt Brown & Carey, to assess the options. The scope of work involved developing a scan of national and local options, including revolving loan funds and interest rate buy-downs, and supporting negotiations. As a result, the following three viable solutions were identified:

- GEO-Smart Loan, a GE Capital product: interest rate buy-down supported financing available nationally and managed by the Electric and Gas Industries of America (EGIA).
- 2% interest reduction, Centris Federal Credit Union of Omaha: interest rate buy-down supported financing available to eligible members of this credit union. Reduction based on existing loan offerings.
- 2% interest reduction, Peoples Choice Federal Credit Union of Lincoln: interest rate buy-down supported financing available to eligible members of this credit union. Reduction based on existing loan offerings.

2.2 Residential Program

2.2.1 Key Components of Vision

The reEnergize Program's residential component evolved over the period of the grant, but there were six key components of the vision that were retained:

1. Participants shall receive whole-home energy evaluations with standard results that include a test-in, calculation of energy savings, and a test-out.

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2. Evaluators and Upgrade Contractors shall be qualified based on skills based training, be required to utilize boilerplate contracts, and be limited to options from a qualified products list.
3. The energy evaluator and the upgrade contractor must have a neutral, unbiased relationship.
4. All participants shall be required to select their evaluator and upgrade contractors and make a financial contribution toward the work performed.
5. Upgrade Contractors shall serve as a general contractor, capable to performing or responsibly subcontracting all scoped work.
6. As a free and fair market program, all work shall be performed on a competitive basis by the private sector.

These six key components were considered to be the foundations of the market that the reEnergize Program hoped to build on for the future.

2.2.1.1 Standard Contracts

During the development phase of reEnergize, it was determined by the program administration and leverage partners that the program needed consistent requirements and standard contracts for private workforce involvement. The intent was to minimize conflict of interest and perceived favoritism. If all evaluators and upgrade contractors knew the requirements of the scope and were subject to equal standards, then a level playing field would be established in terms of pricing and quality assurance reviews.

In addition, the contracts were intended to allow participants assurance of contractor qualifications, and a level of protection regarding workmanship and the completion of work.

Standard contracts were utilized for both the Energy Evaluation and the Energy Upgrade Contracting phases of the reEnergize work. These contracts were called upon on multiple occasions to assure completion of the work or allow for revisions to scope due to change orders at a fair and reasonable cost.

There were complications with the contracting process, often due to evaluators, upgrade contractors, or participants wanting to move quickly through all stages of a project. Generally, no major issues would arise in these circumstances as the documents would be signed prior to payment of the evaluator or contractor, but it did create potential risk scenarios if the participant and the contractor did not agree on proper completion of scoped work, see Appendix 2.a and Appendix 2.b.

2.2.1.2 Whole-Home Energy Evaluations & Upgrades

The original grant Funding Opportunity Announcement from the Department of Energy sought programs designed to tackle whole-home energy upgrades rather than single-measure programs that focused solely on insulation, lighting, or HVAC upgrade. Therefore,

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the reEnergize Program made comprehensive energy evaluations and upgrades a central focus of its delivery process.

The reEnergize standard for whole-home energy evaluations is based on the Building Performance Institute's guidelines. The essential components include a walk-through of the home (inside and outside), recording of observations, assessment of leakage with a blower door (or alternative method if vermiculite or asbestos is present), and completion of Combustion Appliance Zone (CAZ) testing for furnace and water heater safety. The reEnergize Program created Test-In forms for energy evaluators to use, see Appendix 2.c.

After recording observations in the home, the evaluator enters the data into a modeling application, such as NEAT, REM/Rate, Calculated Deemed Savings, or Optimiser, to estimate the energy savings associated with the energy upgrades. Typically a comprehensive energy evaluation would last 3 to 4 hours in the home and an additional 3 to 4 hours analyzing the model and writing up the report. The average cost of a comprehensive energy evaluation was between $450 and $1000, depending on the size of the home and degree of complexity.

Some of the most critical technical challenges with energy evaluations involved calibrating energy estimates to the actual home being evaluated, estimating air sealing reduction potential, and utilizing proper R-values for existing materials, such as floor boards in the attic or walls.

Energy upgrades on the home also needed to consider the home as a system, rather than a single upgrade. Energy Upgrade Contractors, whether they were Weatherization or HVAC specialists, were required to complete the full scope of work, either by themselves or through partial subcontracting. Training requirements taught the upgrade contractors the importance of considering the whole home when properly sizing furnace or air conditioning equipment, or determining the amount and type of weatherization work required to meet the infiltration number according to blower door testing.

Some of the most critical technical challenges with energy upgrades included; improperly identifying expected cost of work based on evaluator comments, not having correct equipment and supplies needed for the job, and uncovering health and safety concerns that either were not or could not be identified during the energy evaluation.

Post upgrade, the energy evaluator returned to the home to conduct a Test-Out. The reEnergize Program created Test-Out forms for energy evaluators to use, see Appendix 2.d. In most cases, the same energy evaluator who had conducted the Test-In, returned to perform the Test-Out. This quality assurance process was similar to the evaluation, but primarily focused on confirming the completion of the work and performing safety tests in the CAZ and with a blower door. In certain circumstances, when the energy evaluator was not available in a timely manner, the Test-Out would be performed by another qualified evaluator. In about

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20% of the projects, no Test-Out was performed due to lack of responsiveness or refusal by the participant. Generally, the Test-Outs took around two hours to complete and were valued at $150. The program covered the complete cost of the Test-Out for a participant.

If the Test-Out was satisfactory and there were no outstanding customer concerns regarding workmanship, the evaluator, upgrade contractor, and participant signed a Triple-Sign-Out (TSO) form that confirmed satisfaction with the work and completion of the project, see Appendix 2.e.

2.2.1.3 Informed Consumers

One of the three main barriers to energy efficiency markets, as described in the original Funding Opportunity Announcement, was the consumer's lack of access to information. Whole-home energy upgrades are relatively rare as the approach in the industry nationwide has been piecemeal based on the consumer's budget, time constraints, and personal drivers. In addition, the workforce does not contain as many whole-home energy upgrade contractors as it does heating/air conditioning or insulation specialists. Plus, the energy evaluator industry is relatively young with no national standard that determines type of work expected, although the Department of Energy and BPI are working to address this. Finally, the technical nature of the information is not easily translated into common terms that non-technical consumers can absorb.

This combination of factors makes it difficult to truly inform the consumer about their best choices. Through marketing campaigns, the reEnergize Program spread the message about the efficacy of energy efficiency and the value of acting to reduce energy consumption as soon as possible. Info-videos were developed and shared to describe the reEnergize process and "what to expect" during the energy evaluation and upgrades. These tools were very useful in educating and recruiting participants. The use of a qualified contractor list, the neutrality of the energy evaluators, the involvement of the City as administrator, and the use of an ombudsman in the form of the TSI team, helped to overcome many consumers uncertainty about not being energy experts in order to participate.

The reEnergize approach to informing the consumer during the project was to establish boilerplate contracts and create a spreadsheet that both reported the energy savings in common metrics, like kilowatt-hour, therms, and costs, and allowed them to collect line item estimates from upgrade contractors so they could compare and contrast cost-effectiveness. It was decided to use a spreadsheet rather than a web-based platform because of the portable nature of the spreadsheet which was used by evaluators, participants, and contractors to communicate recommendations, pricing, consumer decisions, and incentive calculations.

The spreadsheet was dynamic, which allowed consumers to "play" with their options and reach their personal "sweet spot" between the savings generated and the cost of the

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upgrades. The spreadsheet calculated energy savings and payback periods, and ranked the upgrades based on which item would be most cost-effective for them.

In general, the feedback from consumers was that the spreadsheet tool was helpful in evaluating the options, but that they would prefer something more streamlined and even less technical. They did learn much from the estimated pricing for work and many appreciated the high-low range estimates.

2.2.1.4 Addressing conflicts of interest

Consumers want to know that the recommendations they receive for work to be performed is based on industry best practice and not guided by a financial stake between the one making the recommendations and the one performing the work. It was for this reason that one of the program requirements was that the evaluator could not also be the upgrade contractor, and vice-versa.

While this generally resolved blatant conflicts of interest, it also presented a challenge as evaluators and contractors were required to build and maintain multiple relationships. Some energy evaluators were skilled in performing the required energy evaluation process, but lacked understanding of contracting principles and codes in scoping the work. This could sometimes lead to a conflict between what the evaluator set as an expectation for the consumer and the most cost-effective upgrade work to achieve the performance target. In most cases, a conversation between the evaluator and selected upgrade contractor would resolve the conflict. In a few cases, the Technical Services Implementation team would become engaged in evaluating the reasoning of both sides and presenting the solution to move forward.

2.2.2 Qualified Products List

Potential residential upgrades covered a wide variety of areas, with diverse skills needed and nearly unlimited products available to fulfill the listed scope. Based on industry experience from the TSI team, a Qualified Product List was developed and continually updated for all materials to be used in completing upgrades.

Upgrade contractors were very willing to follow the Qualified Product List.

2.2.3 Evolution of Project Delivery Process & Incentives

The reEnergize Program began as a blank slate with only a few qualified energy evaluators and no qualified contractors previously working in the Omaha and Lincoln area. reEnergize set out to define the path not only for the program but for the market. This section will discuss the original program design, major changes that were made, and the customer experience including program staff's efforts.

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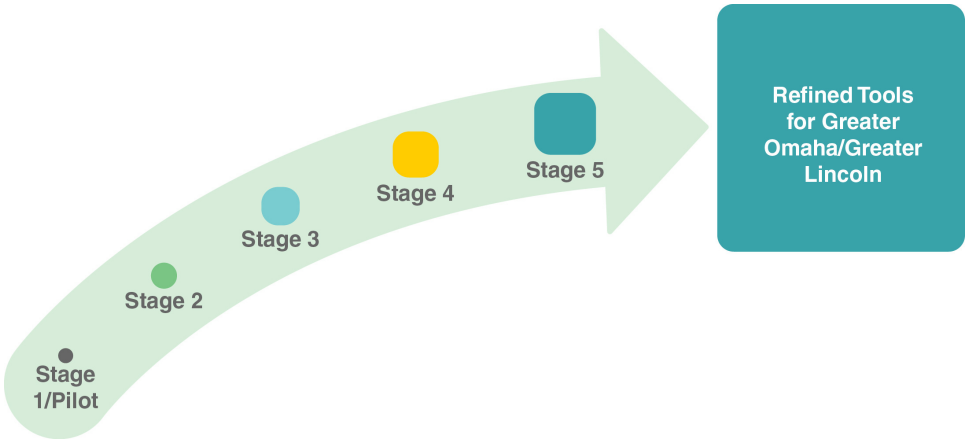
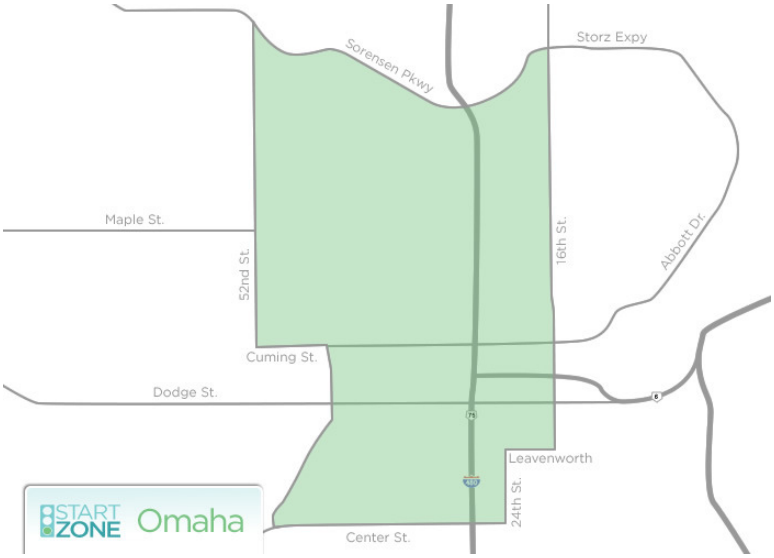
2.2.3.1 Initial Design

The residential program was designed to be updated in Stages, specifically allowing for large programmatic changes based on previous experience.



Initial program design was focused on “Start Zones” in both Omaha and Lincoln. These areas were selected based on older building stock, and the greatest potential for cost-effective energy upgrades.



Omaha Start Zone, version 2

Initially, projects with similar scope of work were to be grouped together into a “bundle” which would allow contractors to purchase materials in bulk, have assured work to complete, and to help bring down prices.

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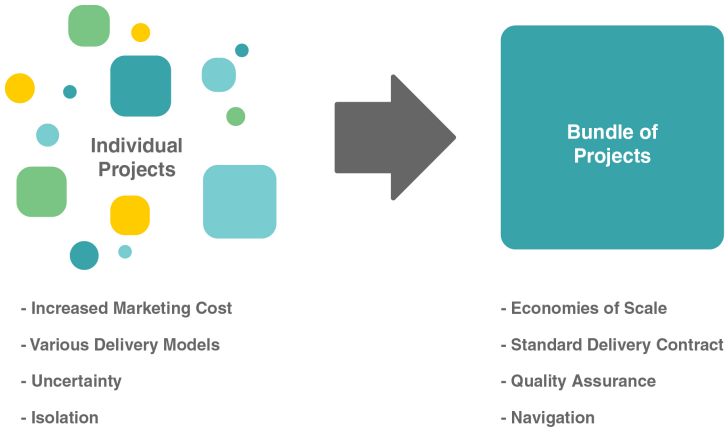
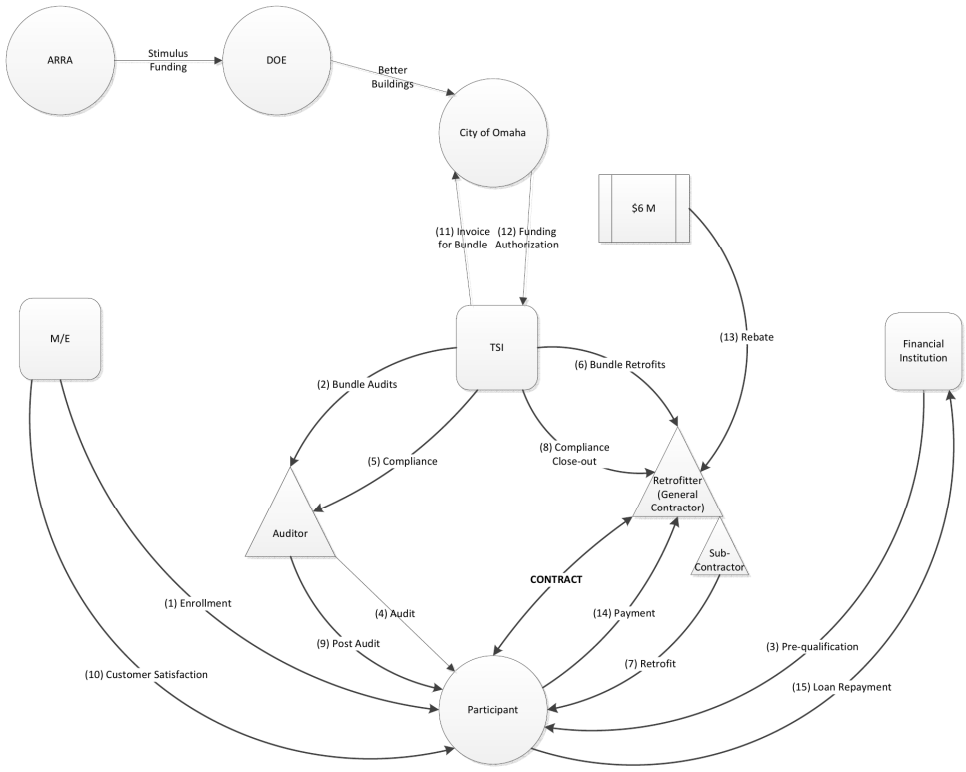


Prior to any projects being bundled and bid collectively, this idea was transitioned into an individual bidding process to allow participant to have direct selection of their own contractors. This change specifically shifted to a market-based program implementation.

The first task for the TSI team, was to define the relationship between the reEnergize office, consultants, evaluators, upgrade contractors, and participants. This “spider” graphic (as it became known) from November 2010 shows the first iteration of how these relationships would be structured. Even at the conclusion of the reEnergize Program, this graphic is still very representative of the process.



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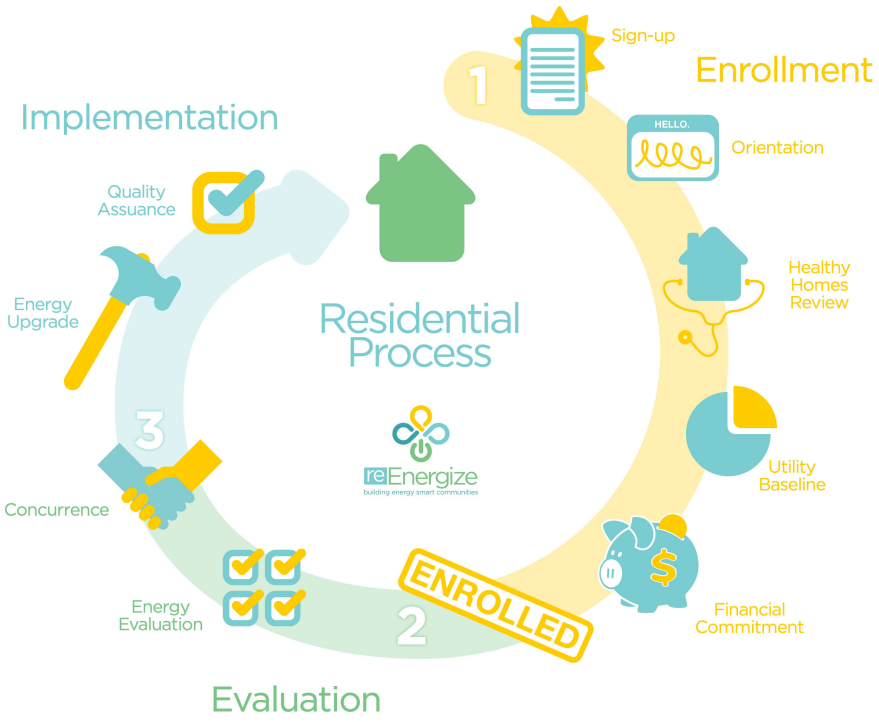
Initially, the program started with a detailed 11-step approach leading participants from signup to quality assurance.



As the original ***Residential Process*** graphic shows, the 11 total steps were separated into three stages: enrollment, evaluation, and implementation.

The "Healthy Homes Review," which was unique to the reEnergize Program amongst all other grant-based programs, involved a half-hour visit from the local healthy homes professional. The main intent was to identify safety hazards like mold, asbestos, or lead which would otherwise result in the energy evaluator marking it as a "walk away" condition. This initial screening was helpful for evaluators as it presented them with information prior to their visit. It also provided several local non-profit organizations live referrals of residents who needed assistance or resources. If a hazard was identified, the participant was required to remediate before the evaluator could come out.

Another change made to the enrollment stage was the elimination of the financial pre-approval and up front commitment. The original program design set the maximum cost for the participant at $3,500, any project going over this amount would be covered by the program. The intent of this incentive design was to encourage deeper upgrade packages. To qualify the program needed official confirmation the participant could pay this out of pocket or get a small loan to do so. Additionally, each participant was expected to pay $250 up-front to create a "skin-in-the-game" mentality. Through feedback from stakeholders and participants it was determined that incentives should be offered to all projects not just

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projects exceeding $3,500. The final incentive structure would reward people for making the most cost-effective solutions, the only restriction being that each project meets at least 15% energy savings. Participants received $100 for every percentage point their whole-home energy packages made, and the program would cover up to half the cost of the entire upgrade package. This change opened the incentive up for more price points, while creating a minimum energy savings. There was also expressed confusion over the $250 and whether it was meant to represent the evaluation cost or not. The program gave a $100 discount off the cost of evaluation set by the evaluator instead of setting a price for the evaluators and then credited the evaluation cost when the upgrades were made. These changes were not necessarily simpler in form, so a focus was made to communicate them as simply as possible through cohesive materials which were provided proactively to the participant.

In June, 2012 another significant change occurred when a more heavily incentivized path for the participant was unveiled. The path described above was known from then on as the "market rate" (MR) path and the new path would be known as the "low to moderate income" (LMI) path. The LMI path was meant to invigorate the program with new signups and opportunities for the workforce to gain experience. The general process was the same for LMI participants with the main variances being a $100 payment up front and having the final project determined by the evaluation results versus having the choice of upgrades allowed in the MR path.

The following will recap the process for participant's starting with signup. All signups must ultimately go through the reEnergize website. If participants lacked access to the website they could call our hotline where navigators would answer or return a call within 48 hours. The website was easily navigable for the sign-up process. After the participant viewed the 6 minute orientation video they were directed to the signup form, which was designed to take the participant 5-10 minutes start to finish. The sign-up form ultimately submitted the received applications to the program database referred to as MegaTool. In the application, the participant could choose their evaluator and contractor or leave it blank to choose at a later time and move to the next step. If they did not choose a contractor the project would go out to bid to whichever contractors they chose and they could choose contractors based on cost and reputation at that point.

Once the participant chose an evaluator, MegaTool would automatically notify that evaluator and the participant with an email. The email directed each party to schedule the test-in evaluation. Before the evaluation was scheduled the participant would be required to pay the evaluator for the evaluation and sign an "Energy Evaluation Agreement," which was a contract between the evaluator and participant guaranteeing the scope of the test-in step. The low and moderate income path participants paid $100 total and the market rate participants paid the evaluator's regular rate minus $100 the program paid. Market rate participants knew when they moved forward with the upgrades they would receive their evaluation cost back as a rebate from their total cost in addition to the incentive.

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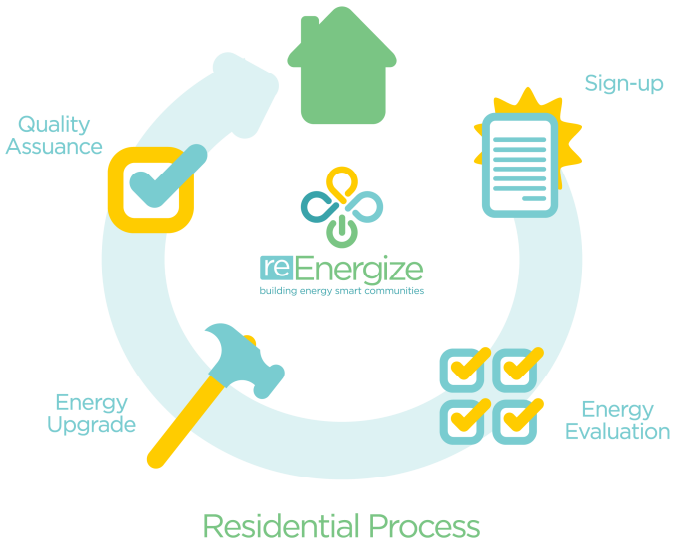
The evaluator was encouraged to provide the evaluation results within two weeks of the test-in appointment. In most cases this timeline was met, with some exceptions. Once the evaluation was received the participants chosen path determined the next steps. If they chose the market rate path the participant then needed to narrow down the work scope to items they were interested in getting pricing for. Once the evaluator received the list of selected items, the next step was to submit the project for bids to our pool of qualified contractors. The evaluator did this by uploading the excel workbook to their Megatool dashboard with the appropriate upgrades marked and clicking "evaluation complete."

Once the evaluation results were provided by the evaluator, the program provided the project scope to the pool of qualified contractors and asked for bids from them. Bids were received back from the contractors and participants chose their preferred contractors to complete the work. The agreement between participant and contractor was bound by the Concurrence Document, see Appendix 2.f. The concurrence document was accompanied by the participant's payment which was capped at $3,500. The city would hold payment of the check in escrow and once the project was finished the city of Omaha would write a check in that amount and for the remainder of the project to the preferred contractor.

2.2.3.2 Major Modification

In the fall of 2011, the program sought feedback from leverage partners, current participants and program staff regarding the lack of participation. Feedback overwhelmingly described a need to simplify the process for participants while supporting the retention of program navigators, the basic structure and intent, and increase the amount of communication. Staff responded by streamlining numerous parts, and overall the process simplified due to a focus on messaging and making functional tweaks to the application process and incentive model.

After a slow start, it became evident the process needed a bit of sharpening and participant communication needed simplification. Changes were made in March of 2012, a little over a year after the original process had begun.



The "enrollment stage" received the most scrutiny. It was determined this stage could do without and modify steps like financial commitment, orientation, and healthy homes review. First the process of signing up was simplified by compressing into two pages and

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excluding non-essential questions. Next, the half-hour in person orientation meeting was replaced with a six minute instructional video at the beginning of the refined online signup.

In the end, only a few hazards were identified and the process of getting an evaluation was held up dramatically, so it was removed from the process altogether.

2.2.3.3 Minor Modifications

After the program made its largest set of program modifications in the spring of 2012 minor and continual adjustments were made mainly to web interface of the participant and administration dashboards. These adjustments were mainly made to correct for issues that arose naturally or were suggested by participants and program administration. Minor modifications for participants generally included clarification of guidelines on the website or the online signup tool. Modifications for administration generally consisted of participant tracking, document uploading, and access to data.

2.3 Commercial/Non-Profit Program

First, an initial site visit and interviews with facility operators and occupants will be conducted. During the site visit, the Evaluator shall gather enough information to provide an initial list of Energy Conservation Measures (ECMs) and complete an initial description of the facility and it's supporting mechanical, electrical, and architectural systems.

Next, a detailed site investigation will be performed. During this site visit, a thorough investigation of the energy consuming equipment of the facility will be completed

Finally, a Final Energy Evaluation Report will be provided detailing the overall findings of the project. This Final Energy Evaluation Report shall include general and detailed information gathered in the site visits, an estimation of the overall potential to reduce energy consumption, ECM analysis, and a written sequence of operating changes for low cost and no-cost ECMs.

The ultimate goal of the Advisor is to provide the building owner with input to implement the ECMs they wish and maximize their return on investment, by conducting an Evaluation Review Meeting with participant to discuss the results of the Final Energy Evaluation Report and answer any questions regarding suggested Energy Conservation Measures (ECMs) and prioritization for future implementation and capital projects. The Implementation Advisor will also provide strategic guidance for the Sustainability Action Plan.

The Implementation Advisor then schedules the implementation planning meeting with the evaluator and program participant to discuss the Sustainability Action Plan, the recommended ECMs for Implementation, the green checklists, and the most economical implementation delivery method for the owner. A Sustainability Action Plan is a plan outlining a company's sustainability goals and the vision to complete those goals within a

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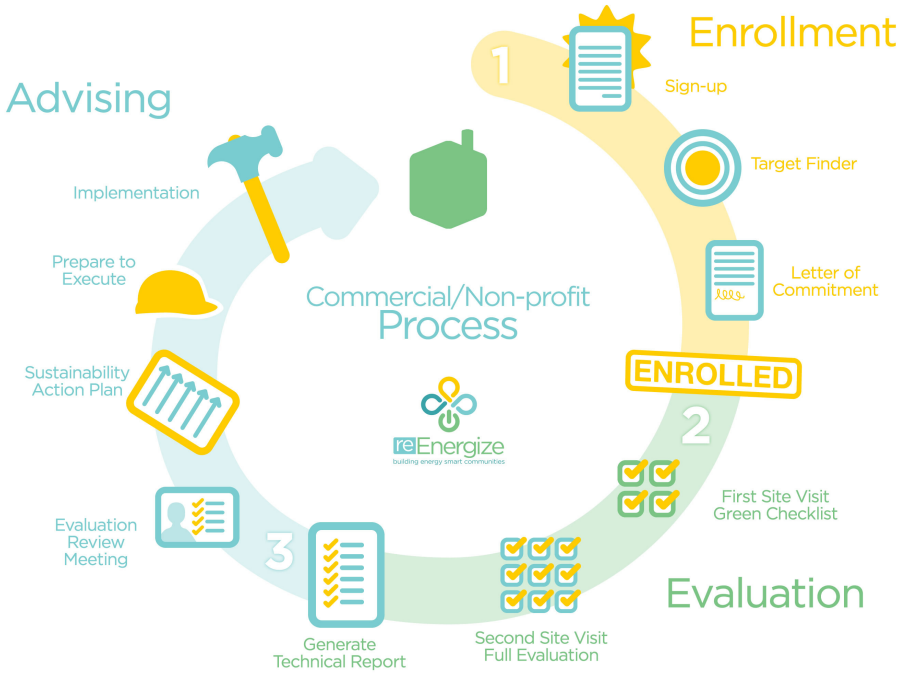
specific timeline. The recommended ECMs for implementation should be used to achieve the goals outlined within the Sustainability Action Plan.

The Implementation Advisor will then prepare for Implementation by running the Cash Flow Opportunity (CFO) calculator, solicit Requests for Proposals, prepare bidding documents, assist in securing loans for the building owner, and finally prepare an appropriate construction schedule for Implementation of the project.

2.3.1 Key Components of Vision

The commercial program was designed to provide professional services to small businesses and organization who otherwise might not have the ability to account, measure, and reduce their energy consumption. The process was based upon the residential model, with specific tools and steps focused on commercial building needs.



2.3.2 Scope of Work

Commercial and nonprofit organizations chose an qualified energy evaluator from a list of qualified companies. The TSI team provided industry information regarding qualifications and experience, work standards, scope of services, deliverables, and invoicing. See Appendix 2.g for Commercial Energy Evaluator Scope of Work.

Upon completion of the evaluation, the Advisor would meet with both the evaluation company and the participant to review the results and discuss next steps. Commercial Advisors submitted relevant qualifications based on relevant knowledge and experience, and specifically energy efficiency financing, see Appendix 2.h.

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3 Workforce Development

The fundamental objective of the reEnergize Program was to build a market of qualified professionals. Several types of different services are needed in a successful market, and each has requires different skills to be successful. Energy Evaluators (sometimes called "Auditors"), Upgrade Contractors (rather than "retrofit contractors"), and specialty contractors each had different qualifications, scope of work, and interactions with reEnergize participants. A participant in the program is only unique from a "customer" in a market based on receiving incentive funding, and additional engagement communication from program staff. By developing technical, customer, and business skills, contractors working with the reEnergize Program were able to gain valuable experience to help them be successful in the non-subsidized market.

3.1 Energy Evaluators

The scope of work for an Energy Evaluator is to determine how much energy is being used, in what way energy is being used, and to make recommendations about specific ways to save energy and money in a home. National standards for residential energy analysis have taken significant steps forward over the past several years, and the reEnergize Program used existing certifications to determine qualification as an evaluator with the program.

BPI Building Analyst
http://www.bpi.org/professionals_upgrade.aspx

RESNet Rater
http://www.resnet.us/trade/home-energy-raters-hers-raters

See Appendix 3.a for evaluator qualifications, and Appendix 3.b for evaluator application.

Evaluators used a variety of specialized tools, including a blower door to measure air infiltration (left) and an infrared camera (right) to visualize temperature variations.

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3.2 Upgrade Contractors

Based upon the recommendations and scope of work from the evaluator, participants chose an Energy Upgrade Contractor as the single point of contact to complete and oversee all energy, safety, health, and comfort improvements in the home. At the beginning of the reEnergize Program, there were no contracting companies in the Omaha or Lincoln market who had completed a nationally-recognized certification for energy efficiency. The Department of Energy has developed several different sets of guidelines for this type of work, including the *Workforce Guidelines for Home Energy Upgrades*, a set of the Job Task Analysis documents, and standards for accredited training programs. These documents are continuing to develop, but basic standards have become recognized and accepted across the country.

See Appendix 3.c for Upgrade Contractor qualifications.

Initially, the scope of work for upgrades was provided as an independent document. As the program made changes to project delivery that scope was incorporated into the Energy Upgrade Agreement, see Appendix 2.b.

3.2.1 Weatherization Contractors

Air sealing and insulation work was completed by contractors specifically trained in comprehensive home upgrades. Flow of air, movement of heat, and moisture management are strongly inter-related, making changes to one part of a building can have significant impacts in other areas. All employees of a contractor who would perform the weatherization (air sealing, insulation) work in a home were required to complete specific training, and a Crew Chief was required to oversee all work on reEnergize projects.

A weatherization employee using injection foam wall insulation to both insulate, and air seal.

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3.2.2 Mechanical Contractors

The number of weatherization-specific contractors with the reEnergize Program grew steadily over time, but market are slow to develop. In order to take advantage of existing customer lists and engage more participants, mechanical contractors were invited to become Upgrade Contractors and oversee weatherization work. Existing guidelines for mechanical work are well established, but oversight of energy efficiency work is a relatively new area for most HVAC professionals. In order to demonstrate knowledge regarding whole-home upgrades, mechanical contractors needed to complete the Crew Chief training. To provide additional flexibility in training, online completion of an existing national certification was also accepted.

RESNet Energy smart contractor, http://www.resnet.us/qualified-contractor

A wide variety of existing heating and cooling systems were encountered and upgraded throughout the reEnergize Program. Most newer homes had a forced air furnace, although many were extremely old, inefficient, and in need of significant work. Mechanical contractors were extremely successful at engaging customers who needed furnace, air conditioner, or other work, and encouraging those customers to participate with reEnergize. Participants had an evaluation completed and selected a more comprehensive set of upgrades including the mechanical work that would otherwise have been done. This allowed them to have the same new equipment installed, additional work completed, and with incentives based on energy savings, the project cost *less* than the mechanical work alone.

An extremely old boiler was removed and a smaller and significantly more efficient unit was installed with the radiant floor heating system.

Mechanical contractors expanding their business model to provide comprehensive home energy services was discussed at every BBNP conference, and was successful at engaging additional participants with larger scope of work in the reEnergize Program.

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3.3 Job Creation Numbers

Market development labor was conducted in three main areas. Administrative employees were directly employed by the reEnergize Program at the City of Omaha and City of Lincoln. Consulting hours were completed by the TSI team, M/E team, and for navigation services. Energy evaluators and upgrade contractors were selected by participants and invoiced hours specifically for services completed on reEnergize projects.

In order to account for annual Full Time Equivalent (FTE) position, 2,080 hours were used as one position over the course of one year. Employees, consultants, and contractors from different organizations are counted based on the most accurate reporting for the variety of individual positions.

3.3.1 Administrative Staff

Direct reEnergize Program employees worked a variety of different hours, and for a variety of durations over the period of the grant. The following numbers are listed over the course of 3.5 years from May 2010 through December 2013.

City of Omaha

- Kristi Wamstad-Evans: 3 FTE
- Eric Williams: 3 FTE
- Jason Kubicek (combined with Christ Stratman): 3 FTE
- Jerry Lawson (Douglas/Omaha GIS): 2 FTE

City of Lincoln

- Milo Mumgaard: 2 FTE
- Willa Tharnish (combined with Justin Loundes): 3 FTE

3.3.2 Technical Services Implementation Team

TSI invoices account for the number of hours worked by each member of the team, during each monthly invoice. A change in contract invoicing between stages was made at the start of Stage 5 in 2013 and tracking of hours came from either the initial contract, or completed invoice as listed. Overall, 16 total employees worked on the TSI team in the areas of program management, and residential or commercial market development consulting.

- Stage 0, 1 (contract): 3,781
- Stage 2 (contract): 2,541
- Stage 3 (contract): 1,903
- Stage 4 (contract): 1,890
- Stage 5 (invoice): 1,812
- Stage 6 (invoice): 871
- Total: 12,798 = 6.39 FTE

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3.3.3 Marketing and Engagement Team

Changes in program staff and consultant contracts

- HDR: 2,918 hours from 24 different employees = 1.4 FTE
- Omaha, Danyelle Baratta: 2 FTE
- Lincoln, Steve Larrick and Sarah Erdlen: 3 FTE

3.3.4 Energy Evaluators

At the beginning of the program, a handful of professionals were conducting residential energy analysis. A wide variety of qualifications, scopes of work, and results were presented to customers, making identification of high quality work extremely difficult. For the vast majority of energy evaluators who worked with the reEnergize Program, there was very little or no work being completed on projects outside of reEnergize. Some of the evaluators also worked for energy upgrade companies (not completing both scopes of work on the same project), and some evaluators chose to work less than what would generally be considered a full time job. Numbers for FTE from energy evaluators for the program is estimated.

- 27 qualified Energy Evaluators = 18 FTE

3.3.5 Upgrade Contractors

Hours for project completion was reported by contractors, and submitted with quarterly reports. Accounting for all hours reported, filling in a minor amount of missing data based upon project averages, and accumulating all projects gives a good calculation for FTE.

- Total reported retrofit hours = 37,935
- Estimated non-reported hours based on 28.3 hours/project average = 672
- Contractor upgrades hours as FTE = 19

3.3.6 Jobs Created

A combination of all staff, consultants, and contractors hours provides a reliable calculated number of employees for the entire reEnergize Program.

- Total FTE = 66

3.4 Trained students

During the course of reEnergize, Metropolitan Community College developed a training facility for the weatherization workforce. Although not all students become employees with a local company, they would all qualify based on reEnergize workforce standards.

MCC Weatherization Training Center, http://www.mccneb.edu/cps/green/wtc.asp

- Weatherization Installer I – 122
- Weatherization Installer II – 99
- Combustion Appliance Zone (CAZ) – 65
- Crew Chief – 46
- Energy Auditor – 21

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4 Project Delivery Process

4.1 Residential

In March 2012, the reEnergize Program adjusted its project delivery process for the residential program to streamline sign-up and catalyze project completion. The process was scaled down from 10-steps to 4-steps, including Sign-up, Energy Evaluation, Energy Upgrade, and Quality Assurance or Test Out.

During the Sign-up phase, participants would set-up their account via the reEnergize website. The form for signing up was relatively simple, requesting information like name, address, number of occupants in the house, identification of preferred evaluator or contractor (if already selected), and desired path, either Market Rate or Low to Moderate Income (based on financial qualifications). This process would set up a new entry in MegaTool that would be used to track the participant's progress through all steps of the program and allow evaluators and upgrade contractors to upload the required materials for their project.

If a participant selected their evaluator during the sign-up phase, then their evaluator would be automatically assigned and access would be granted to the evaluator to upload the test-in materials. If the participant signed up without an evaluator, then either an automated reply would be sent to the participant's email or the local Navigator would contact the participant to discuss their next steps. A list of all qualified evaluators was distributed to the participants without evaluators.

Once the evaluator was selected, the participant and evaluator would schedule time for the comprehensive energy evaluation. Once the energy evaluation was complete, the energy evaluator would discuss the results with the participant. At that time, the participant could review the results and make decisions regarding the recommended upgrades. Once finalized, the evaluator would upload the required documents to MegaTool, including the Energy Evaluation Agreement, BPI Test-In sheet, evaluator workbook, Modeling report (applicable only for Market Rate), and photos. Once these materials were uploaded, the evaluator would be able to select an "Evaluation Complete" button and submit an invoice for the Test-In incentive.

Next, if the participant had selected a contractor during sign-up, their profile would be viewable on their upgrade contractor's MegaTool dashboard. The upgrade contractor would then open the evaluator's workbook, add their bid amounts, and email the workbook to the participant. If the participant did not select a contractor, then the evaluator's workbook would be made available to all qualified contractors. The participant would often be contacted directly by one or more upgrade contractors to schedule a walk-through and offer a bid. The participant would select their preferred contractor and sign the Energy Upgrade Agreement, locking in the scope of work, payment due, and incentive amount. Once the

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upgrade contractor uploaded a signed Energy Upgrade Agreement, MegaTool would automatically assign the contractor to the participant, allowing greater access to the participant's profile and invoicing tools.

Once the Energy Upgrade Agreement was signed and any outstanding questions resolved, the Upgrade Contractor could commence work on the project. Typical projects took anywhere from 2 to 6 days to complete, depending on the level of complexity and the availability of materials. If issues arose during the upgrade process, participants were informed to call their local Navigator with any questions.

When the upgrade was complete, the Upgrade Contractor would contact the Energy Evaluator to schedule a Test-Out of the property. The Test-Out process included a review of the work completed and safety testing of any heating, ventilation, or air conditioning equipment. If all work was deemed satisfactory by the Energy Evaluator, they would sign the Triple-Sign-Out sheet and provide it to the property owner (or their designee) for their signature confirming satisfaction. If the Evaluator determined a portion of the scope to be incomplete, or identified another issue related to quality of work, first he contacted and discussed with the upgrade contractor.

If agreement could not be reached between the Energy Evaluator and the Upgrade Contractor on the proper solution, then they would contact the Technical Services Implementation team to discuss the issues. TSI would either make a decision based on industry best practices, or visit the home to review the situation in person. The decision of TSI would be final. If the Evaluator or Participant did not agree with TSI's decision, then they could note this on the Triple-Sign-Out. If the Upgrade Contractor did not agree with TSI's decision, then a new contractor would be selected to complete the work. Payment would be made to the original contractor and pro-rated based on the work completed minus the work required to correct the outstanding issues.

Once the Triple-Sign-Out was uploaded by the Upgrade Contractor, the project was considered complete. The Upgrade Contractor would then invoice the program for the incentive portion. Upon completion of the Test-Out, the Energy Evaluator could invoice for the Test-Out amount. In the case that they were unreasonably called to re-test-out on multiple occasions, the Test-Out fee might be higher than the flat rate of $150 paid by the program.

Generally, this process was the same, regardless of whether a participant was involved in the Market Rate or Low to Moderate Income path. The distinctions between the Market Rate and Low to Moderate Income Path are discussed further in the sections below.

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4.2 Market Rate and Low to Moderate Income Paths

In Appendix 4.a and 4.b step-by-step descriptions of the market rate and low to moderate income paths for contractors and evaluators is detailed. These guides for contractors and evaluators were the subject of a workforce meeting in the Summer of 2012 after the revamped process was created. The guides direct the contractor and evaluator roles through the expectations of each progression, highlighting each roles essential duty while providing the other essential duty of the other role as well.

Additionally in Appendix 4.c a one-page document is provided. This document details the process for the participant and was posted on the reEnergize website to provide expectations for the participant. The document highlights costs and incentives for each program path and is simplified to the final four step process.

4.3 Commercial/Non-Profit

Businesses and organizations either selected a contractor from the reEnergize list based upon direct marketing and advertising, or were contacted by a contractor offering services and information about the reEnergize incentives. Contract documents were signed, and reEnergize provided assistance when necessary, but due to the more mature market for commercial services, significantly relatively limited activity was needed from reEnergize staff or consultants.

4.3.1 Evaluation/Advising Path

After signing up, a commercial participant immediately began to work with their selected commercial evaluator to identify existing energy use and potential for savings. Upon completion of the technical evaluation, experienced industry professionals from the TSI team reviewed the document as an un-biased observer. Comments were submitted, and the evaluator worked with the TSI team to complete a report which met industry best practices.

The complete technical report was then given to the Advisor at a combined meeting. The participant, evaluator, and Advisor worked to make sure all parties understood the desired outcome of the participant, who was essentially a professional client with services paid by incentive funds. If any issues could not be resolved between the three parties, additional help was provided by reEnergize.

Overall, evaluation and advising services experienced relatively little difficulty. A previously existing service, well-established professional contractors, plus incentive funding is a recipe for success. As the residential program became an increasing focus through stages of updates, funding availability for commercial projects was limited. Providing incentives was effective at engaging small businesses and organizations toward reducing their energy use.

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4.3.2 Lighting Incentive

reEnergize lighting upgrades were completed as an extension of an existing program. The qualified contractors from the OPPD Lighting Trade Ally program were a very strong starting point for bringing new LED products to market. By providing additional funding, the simplicity of "double the OPPD incentive" proved to be extremely marketable. The program was specifically designed for simple, screw-base LED upgrades, which made the labor simple and rapid to complete.

Lighting upgrades being completed by a local contractor.

Contractors were very grateful for the additional incentives, and the completion rate of OPPD projects during the additional incentive period is believed to be much higher than usual. Specific data on annual project completion has not been provided by OPPD.

4.3.3 RTU Controller Incentive

Following the success of the lighting incentive collaboration, OPPD requested that reEnergize provide additional incentive for the Roof Top Unit (RTU) controller program which was being expanded following a very small pilot. Limited direct marketing of the additional reEnergize incentive funding was distributed, and participant was similarly limited. The partnership incentive was designed for up to 100 RTUs, and 48 were completed.

reEnergize team members had relatively limited interaction with either contractors or participants. OPPD provided calculations for projected energy savings based on pilot data, and contractors completed the scope of work according to manufacturer specifications. Upon project completion, invoices were provided to reEnergize showing the calculated kWh savings over the course of a year, and the amount of additional incentive needed to bring the participant's contribution to a 1-year return on investment. Contractors and participants were pleased with the process, the incentive, and the projected savings. OPPD will be continuing the program in the future with strong success expected.

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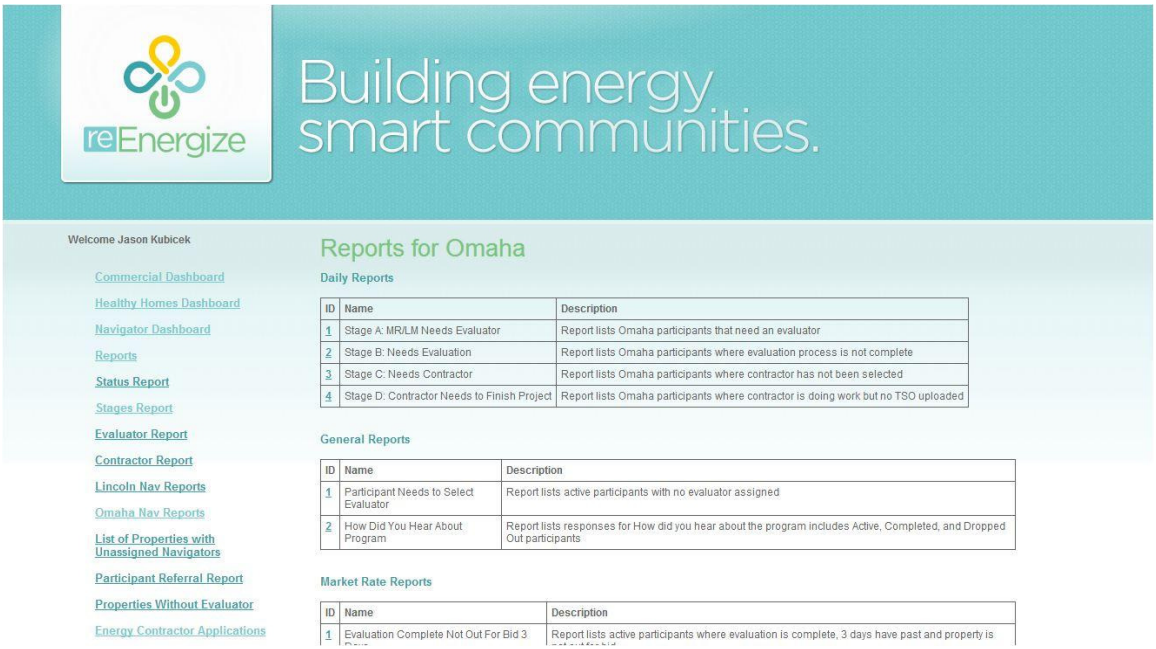
5 Tools

Tracking program effectiveness requires an organized system of capturing and storing discrete data associated with specific participants, for this the reEnergize Program created and used what we called the MegaTool. The reEnergize Program maintained this centralized SQL database to store and reported on participant statistics and supplied data to the Technical Services and Marketing and Engagement Implementation teams for participant reports. Protected data capture included, but is not limited to, participant name, contact information, building characteristics, healthy homes review results, pre- and post-energy evaluation data, upgrades delivered (residential), and historic energy use data.

All of the participant data was stored in a secured web enabled database. Different levels of secure access were provided to those interfacing with components of the reEnergize Program delivery, including Program Administrators, Participant Navigators, Healthy Home Reviewers, Energy Evaluators, Energy Contractors, and participants. Online dashboards were created for each level of access, therefore applying a secure and protected interface of participant information.



View of the Administrator Dashboard and Reports from the web-based Megatool.

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6 Marketing and Engagement

6.1 Marketing Campaigns

reEnergize marketing campaigns began immediately during quarter one of 2011, and strategy was continually improved throughout the program. The original grassroots strategy included leveraging community partners, holding orientations, speaking at community and neighborhood events, and entering ads in low cost neighborhood publications. The modifications to the marketing strategy were in addition to the grassroots efforts and coincided with new incentives that were implemented around the same time. Generally, an effort to incorporate mass marketing was adopted with radio, newspaper, web, magazine ads, and posters. These improvements also coincided with a larger geographic offering to include the entire cities of Omaha and Lincoln.

6.1.1 Branding

The original program "Omaha-Lincoln Retrofit Ramp-up," was rebranded in December of 2010 as the "reEnergize Program." The rebranding process recommended to all programs by the USDOE as a result of market research efforts. For this service a request for proposal was issued for marketing and engagement services and *HDR Inc.* in Omaha was contracted in October of 2010. The general consensus of the reEnergize branding was positive. See Appendix 6.a for the reEnergize Marketing Strategy including the Brand Book.

6.1.2 Yard Signs & Swag

The reEnergize yard signs were a guerilla marketing strategy to increase visibility and awareness of the reEnergize brand around the reEnergize zones throughout Omaha and Lincoln. The sign's design was done in-house by a reEnergize marketing staff member using graphics provided by subcontractor WhatCheer! which were a part of the original rebranding effort included in the brand book. Over 300 signs were distributed to energy evaluators and contractors for placement in a participant's yard while work occurred. The signs were intended to stay in the yard from the time the evaluator did the initial test-in evaluation, throughout the work, and to be picked up at the test-out by the same evaluator.

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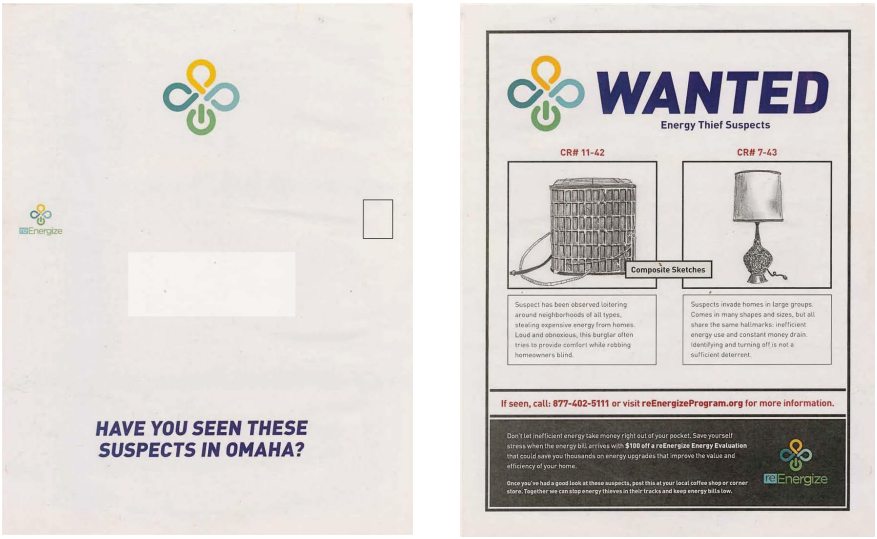
6.1.3 Energy Thief Campaign

The energy thief campaign was a blitz-style effort created by Bozell Integrated Marketing Services of Omaha in coordination with the marketing team. Creating a sense of urgency relative to losing energy and money in homes was the key strategy and highlighting the opportunity to participate in the reEnergize program was the intended result. This campaign consisted of two seasonal efforts and utilized three major types of marketing in Omaha and Lincoln: radio spots, print media, and search engine marketing. Using the results of the first effort in the spring of 2012 a study was conducted by Bozell. With the study results program staff and Bozell Staff surmised an additional targeted mailing campaign for the second campaign starting in the fall of 2012.

For the first time marketing traditional media was utilized with radio and print ads. Bozell and program staff collaborated to record professional 60 second and 30 second radio ads in order to bring widespread notoriety for the reEnergize brand. Direct signups due to radio ads were difficult to track, but a large amount of calls and comments were taken referencing them during the two blitz periods. It is assumed an unknown amount of participants indicated they signed up as a result of a recommendation from a friend, although they may have heard about the program first from the radio ads. This has been confirmed in a few cases. The creative for the radio ads were developed by Bozell staff and the voice was provided by subcontracted talent. See Appendix 6.b for the radio ad transcripts.



Energy Thief flier, mailed to potential reEnergize participants.

Print ads were another traditional marketing strategy for the program. These ads were placed in Lincoln and Omaha magazines and newspapers.

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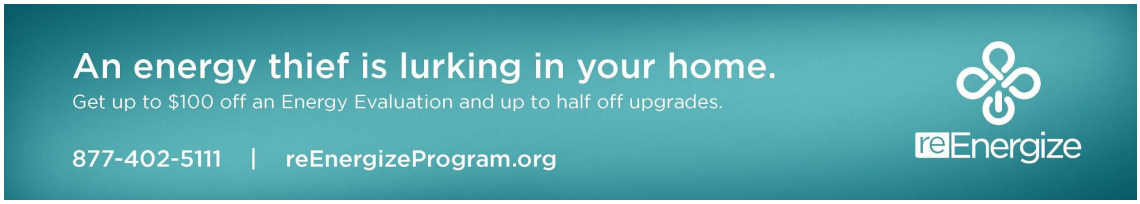
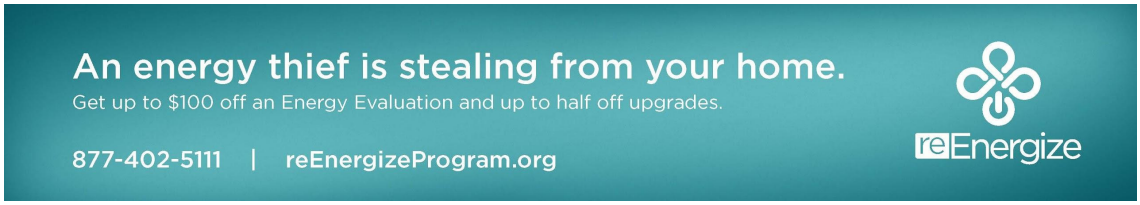
This campaign was designed to spark interest in the reEnergize brand and direct participants to the website or toll-free phone for more information. This strategy proved successful as the majority of reEnergize website hits were linked to a direct URL entry. Creative efforts were provided by Bozell under direction of the Omaha marketing staff.

Search engine marketing was a successful, low cost marketing effort employed by the reEnergize Program. It resulted in a buildup of visitors to the site over a short time. Program staff submitted a list of approximately 80 phrases and words. If a person in the Omaha and Lincoln Metro Area entered one of these terms they would be shown a reEnergize web ad using variations of the above graphics with a click-through to the reEnergize website. Bozell staff would refine the tool to populate the more successful ads as the months went on. Reference the appendix on website analytics to see the success of the marketing campaigns with Bozell.





6.1.4 Market Analysis

After the first marketing blitz was completed in the spring of 2012 the Bozell analysis team conducted a demographic study from the results. The study guided an additional marketing blitz and provided further insights about the development of Omaha and Lincoln markets. See appendix 6.c for the Bozell demographic study.

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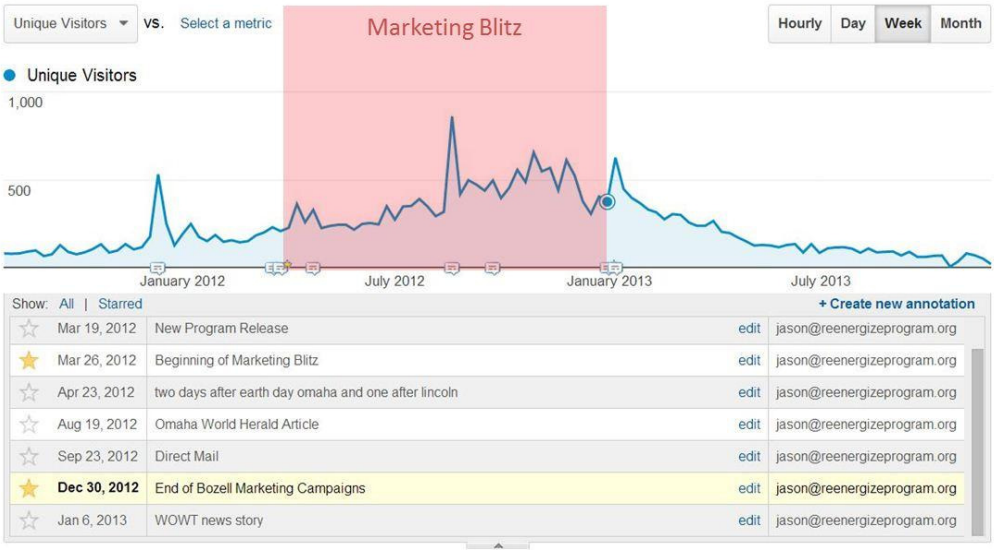

Google Analytics showing pages views, with additional outreach timeline highlighted.

6.1.4 Social Media

With over 250 fans and a range of 30 to 550 views per post, facebook was the most active and successful social media campaign. Posts pictures of actual work happening in homes or pictures of program staff at events or just in the office were most successful, as measured by "Likes", and engagement. Less viewed posts were links to national articles. As a general rule all posts on the reEnergize page were shared with as many personal friends of reEnergize staff as possible to get the ball rolling.

www.facebook.com/reEnergizeProgram

Besides posting relevant articles and pictures of program happenings, all program related events were announced on the facebook page. These events included in-person orientations, neighborhood group meetings, conventions, stakeholder meetings, and contractor meetings. Typically, photos of the events were posted as a follow up.

www.twitter.com/reEnergizePrgm

Eighty-four followers were compiled throughout the program making it a less effective and less utilized strategy. Early on efforts to bolster twitter efforts were initially successful, especially with the help of tweetdeck. Eventually results thinned and efforts were focused on facebook.

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6.2 Delivering Information

6.2.1 Website www.reEnergizeProgram.org

The reEnergize website was accessible by all parties as an information registration hub for interested homeowners, business owners and whole home energy contractors. The website went through one large makeover for content when the program was redesigned in March of 2012. After that information and graphics were tweaked as suggestions or needs arose. Tweaking was kept to a minimum to avoid confusion for participants and contractors, potential and current. The website was originally designed by WhatCheer under the direction of program staff and as a subcontractor to HDR (the marketing firm). Updates were mostly made by program staff using Cushy CMS web editing software.

6.2.2 Orientations

In-person orientations were part of the original grassroots marketing strategy, but were eventually phased out because of poor attendance. These 30 minute meetings were generally held at the "Neighborhood Center" which was located in a central part of the original start zones. The orientation meetings were held every other Saturday and included a PowerPoint presentation by a staff member. The meetings generally consisted of 2-10 potential participants who were curious about the program and were invited to attend the meeting by current participants, through social media, mailers, or word of mouth. The decision to discontinue the meetings was made as contractors became busier with work and were successful bringing in their own participants. In retrospect a meeting of some sort could have helped with information control as well as marketing.

6.2.3 "What to Expect" Videos

The "what to expect" videos were created by Bozell Marketing as a part of the marketing contract agreed to in March of 2012. The videos can be viewed on the program Youtube site: https://www.youtube.com/user/reEnergizeProgram/videos. Guidance was provided by program staff for accuracy and final approval. To keep the cost of production down it was decided to use animation and professional voice instead of professional actors.

The four videos were embedded into the website and facebook page they included an orientation, a choosing a path video, evaluation, and contractor upgrades videos. The objective of each video was to better set expectations for the participants as they entered each step. Upon signup the participant was asked to view the orientation video, which explained the entire process as a whole, but focused in on details regarding signup and how to make choices. An additional choosing a path video was linked to the signup process as well, in order to make clear the difference between the low and moderate path and the market rate path. After the participant has signed up and moved to the evaluation step, they were emailed details about their next steps including the evaluation video. As the participants moved into the contracting stage they would receive a similar email with the contractor video.

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6.3 Tracking Participants & Driving Demand

6.3.1 Energy Survey

In the spring of 2011, a community energy survey was accomplished to get some preliminary study of what the market looked like. This study helped form strategy for the initial grassroots marketing efforts. The results of this study can be found in Appendix 6.d.

6.3.2 Navigators

reEnergize used program navigators to assist participants moving through the process of getting an energy evaluation, hiring a contractor, and getting a quality assurance check. Under guidance of the Marketing and Engagement Coordinator, Omaha and Lincoln used the help of nine navigators throughout Omaha and Lincoln. Navigators were full and part time with four in Lincoln and five in Omaha.

In Omaha, one main navigator was contracted. She was responsible for answering and returning phone calls and emails within 24 working hours. Her actions were the first line of communication for the program hotline and general email address. In addition, this navigator sent emails or letters to participants within 24 hours after signup and was responsible for filtering out test or fake entries as they came in. She acted as a liaison between the participant and contractor in some situations, with the main goal of encouraging direct customer/contractor relation. Interns were also utilized in Omaha to help with sending mail and calling participants among other data-centric responsibilities.

Early on NONA encouraged staff to hire someone with close ties to the North Omaha community. As a result a part-time North Omaha navigator was contracted in fall of 2012. This navigator was identified in partnership by the North Omaha Neighborhood Association and worked closely with North Omaha contractors and participants to ensure quality work, customer satisfaction, and a fluid process.

In Lincoln, three staff members were considered navigators and were also responsible for marketing and engagement duties. Lincoln staff was initially given direction through the Omaha office, but as time went on and participation became more prevalent it was necessary to part further autonomy to the Lincoln office. The Lincoln staff began direct reEnergize efforts in December of 2011 when the Interlocal Agreement was developed by Lincoln staff and signed by both Omaha and Lincoln city councils. Lincoln staff worked in a city-owned building which was centrally located and therefore accessible to citizens who preferred to visit in person.

6.3.3 Generating Reports

In order to proactively engage participants in the program a system of tracking was created, called a “stage report.” The process was divided into four stages. Participant’s received communication after each stage to confirm their intentions of moving forward.

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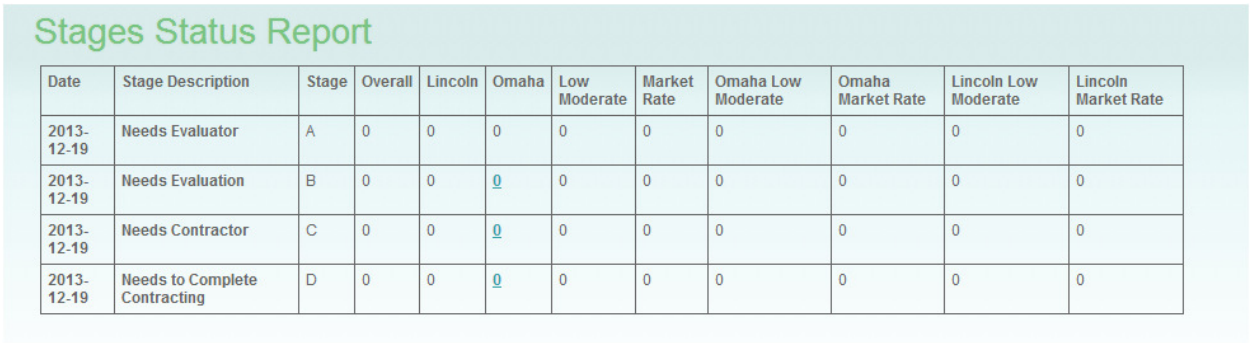
- Stage A - Participant needed to select and schedule an evaluator
    - All participants selected their own evaluator
- Stage B - Participant selected the upgrades that went out to contractors for bids
    - Low/Moderate participants had no choice on upgrades, they paid a low $100 cost for the most cost effective items up to $3,000 in value (selected by the evaluation) and would generally get pushed to Stage C automatically when the evaluator uploaded the required data
    - Market Rate participants paid more and could select in and out of specific upgrades with greater incentive going toward the more cost effective solutions as encouragement. These selected upgrades would go to the pool of contractors who would then provide a bid to the participant
- Stage C - Participant needed to select and schedule a contractor to complete the work
    - Market Rate - the participants chose contractors based on bids and marketing
    - Low/Moderate - the participants chose their preferred contractor
- Stage D - Participant needed to sign off on the triple signout (test out - quality assurance check)
    - Final step in the process was a re-visit from the original (usually) evaluator who went through all of the upgrades for quality craftsmanship and materials, finally the three parties signed the triple signout sheet (evaluator, contractor, participant) and the project was considered finished.

Megatool, the reEnergize Program's central database, was able to create data reports by request. The report pictured below was responsible for tracking participants through each step in the process at each path in the program. Hyperlinks included in the table would populate the list of people in each stage. Navigators and staff members were responsible for keeping track of participants through each of these stages.



Stages Status Report

Date	Stage Description	Stage	Overall	Lincoln	Omaha	Low Moderate	Market Rate	Omaha Low Moderate	Omaha Market Rate	Lincoln Low Moderate	Lincoln Market Rate
2013-12-19	Needs Evaluator	A	0	0	0	0	0	0	0	0	0
2013-12-19	Needs Evaluation	B	0	0	0	0	0	0	0	0	0
2013-12-19	Needs Contractor	C	0	0	0	0	0	0	0	0	0
2013-12-19	Needs to Complete Contracting	D	0	0	0	0	0	0	0	0	0

Screen view of the "Stages Status" report from Megaool.

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7 Results

Results from the reEnergize Program are broken down into the two major market sectors, and the different paths for project participation.

- Residential
    - Market Rate
    - Low to Moderate Income
- Commercial
    - Evaluation & Advising
    - Lighting
    - RTU

7.1 Residential Program

As participants progressed from step to step, their status in Megatool was listed in one of several different categories. Reports were written to query the database for lists of participants in each stage at any given time.

Total residential participants

	Market Rate	Low/Moderate	Total
Omaha	381	576	957
Lincoln	157	246	403
Total	538	822	1,360

7.1.1 Overall

The residential program was the main focus of reEnergize Staff, with many hours tallied strategizing and executing marketing, engagement, technical, and workforce development. Results were slow to start, but adjustments made in March of 2012 proved to be crucial to more signups and ultimately more completions. Larger incentives, a streamlined process, workforce recruitment, and a marketing blitz proved to drive demand for the program.

Initial residential program goals were set at 3,193 homes completed with a $ 1,300 average program investment in each one. As the program struggled to produce signups and completions in the first 6 months, discussions over adjusting the program design began to occur. The discussions within staff were reflective in nature, with both lessons learned and positive experiences. Ultimately, it was decided to require less up front buy-in from the participant and offering larger incentives that would still reward the participant for the most cost effective upgrade decisions. Attached in appendix 7.a are the revised residential budget and targets that were reviewed and approved by the USDOE in September 2012.

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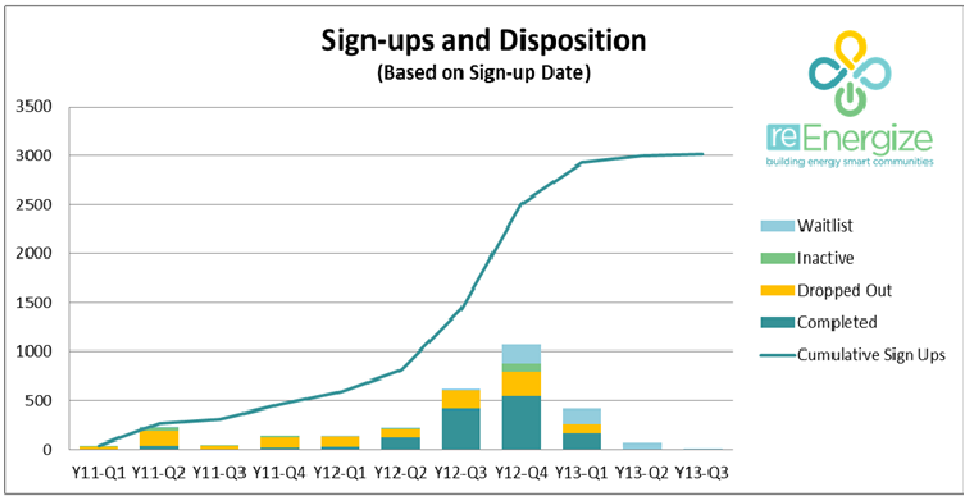
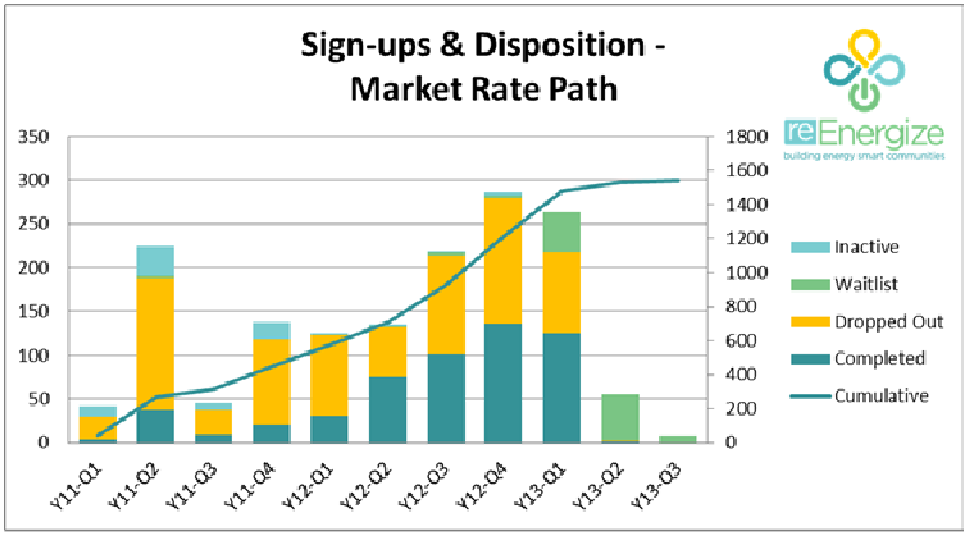
7.1.1.1 Sign-Ups

Signups carried a similar trend to what was seen in most programs across BBNP, one that started slow and ended strong. Initial excitement about the program in quarter two was the result of early publicizing and news articles. From quarter 3 in 2011 to quarter 1 in 2012 signups saw a dip. In quarter two of 2012, after some program changes began to take hold and marketing efforts bolstered signups began a sharp rise through quarter one of 2013. Signups after this period naturally fell off as all new signups were rejected, all projects in process were pushed to completion, and marketing efforts ceased.



7.1.1.1.1 Market Rate Path

Quarter two of 2011 was a positive start for the pilot projects, but as contractors were gathering their momentum, signups took a hit. Marketing staff changed in quarter three of 2011 and it was recognized that modifications needed to occur. As a new incentive structure occurred in quarter two of 2012 so did a new wave of marketing efforts. Most traditional marketing focused on the market rate program since that was the original intent of the program and what would affect the market long term.



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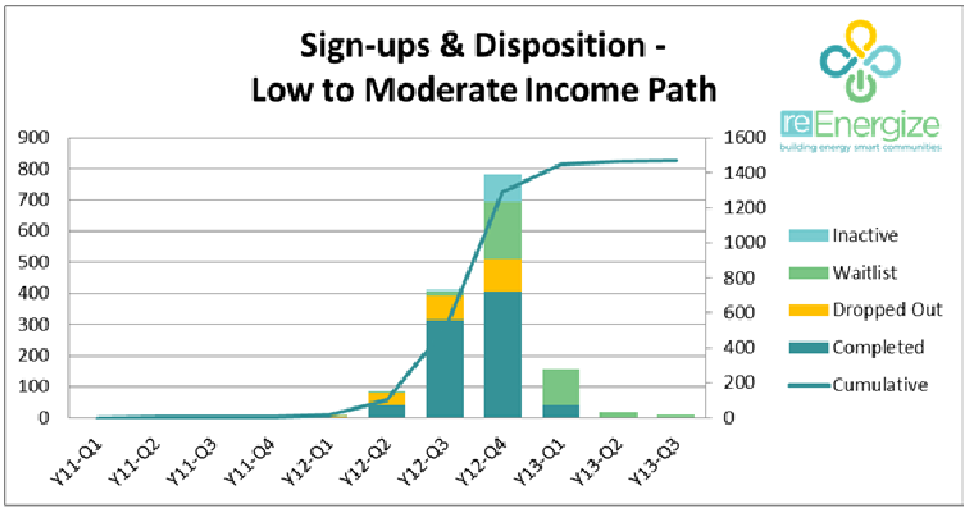
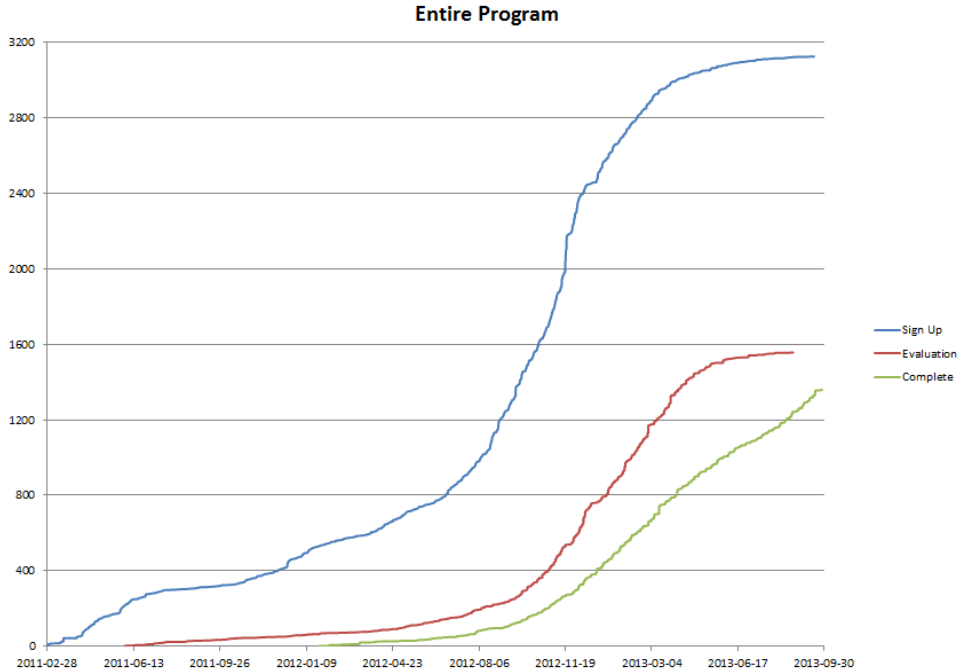
7.1.1.1.2 Low to Moderate Income Path

In quarter two of 2012 the Low/Moderate path was introduced. Marketing efforts focused mainly on word of mouth and workforce assisted efforts. This path was highly incentivized making relatively simple distribution of the message to willing participants. Enrollment accelerated so quickly a waitlist was instituted in quarter four of 2012 for budget reasons.



7.1.1.2 Evaluation-Completion Rates

Completion percentages were accounted throughout the residential program. Due to the time from sign up, to evaluation, to upgrades and completion, there was a lag between metrics. At any given time, the completion percentage was around 45% of participants who had an evaluation completed. These numbers were tracked for each individual project.



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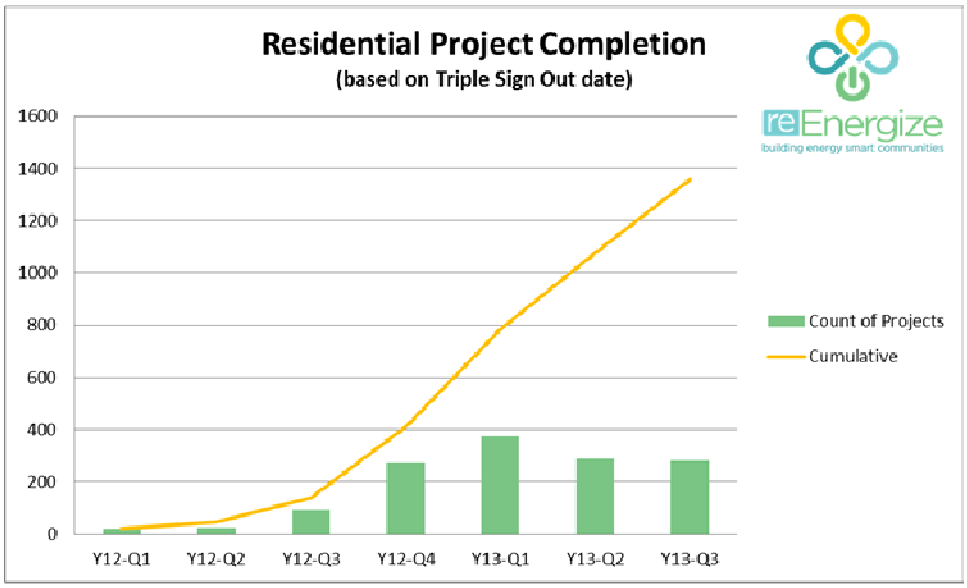
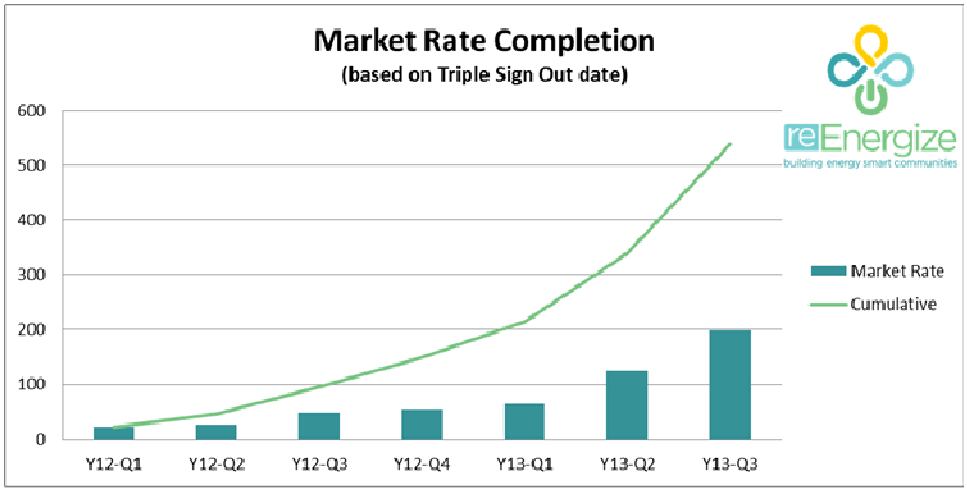
7.1.1.3 Project Completions

Residential projects completion rate was slow during initial stages. Program improvements in March 2012 significantly improved completion rates. Ultimately, deadlines drove projects. The two most successful quarters came as deadlines loomed. The first was the expected deadline of March 2013 and then the extension award pushed back the second deadline to September of 2013 evident in the last two quarters of program participation.



7.1.1.3.1 Market Rate Path

As expected and hoped, the Market Rate program grew at a steady pace. These participants are more likely to be long-term customers for contractors and represent a more financially capable sector. The contractors also had more time to focus on these projects as the low and moderate program projects were mostly wrapped up in quarter one of 2013.



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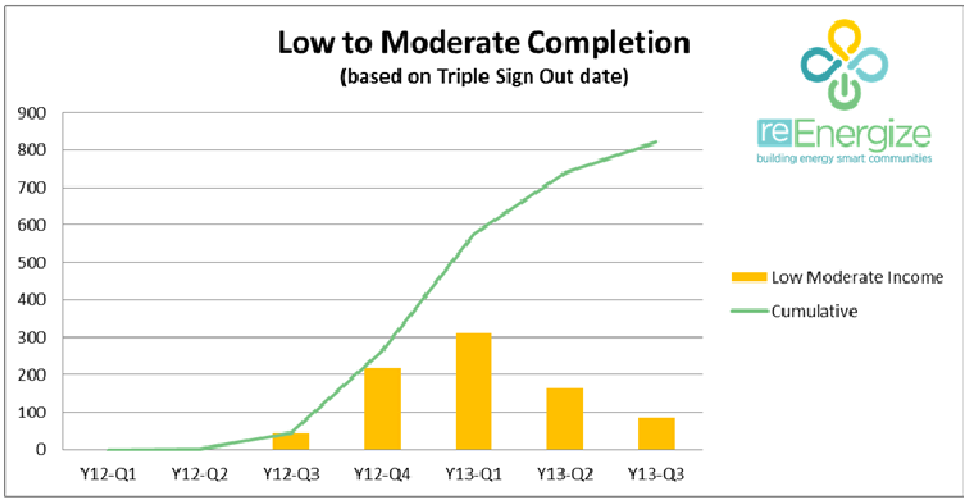
7.1.1.3.2 Low to Moderate Income Path

Low Moderate projects had a shorter expected completion length from evaluation to contracting because it had less flexibility in project type. The ideal low moderate project could be completed in a week if all of the correct procedures were followed.



7.1.1.4 Energy Savings

Energy savings totals for residential projects were measured in kWh, therms and converted to BTUs to allow for comprehensive savings calculations. Based on energy savings and market prices, financial savings were calculated for each project as well.

These numbers represent the entire residential program for both Omaha and Lincoln, including both the Market Rate, and Low/Moderate path.

Overall Program Statistics	
Total kwh Savings	3,926,894
Average of kwh Savings	2,887
Average of Percent KWH	24%
Total Therm Savings	491,568
Average of Therm Savings	361
Average of Percent Therms	36%
Annual Energy Cost Savings	$810,522
Average Annual Energy Cost Savings	$596
Average % of Energy Savings	34%

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7.1.1.4.1 Market Rate Path

Market Rate projects were not limited on project size, the program would cover up to half of the cost of the entire project while rewarding participants for making the most cost-effective solutions. To reward the participants for making the most cost-effective solutions the program gave $100 for each percentage of energy savings. In this program, deeper energy savings measures were made because more financially capable participants took advantage of the matching strategy.

Market Rate Statistics	
Total kwh Savings	2,429,793
Average of kwh Savings	4,516
Average of Percent KWH	33%
Total Therm Savings	250,054
Average of Therm Savings	465
Average of Percent Therms	35%
Annual Energy Cost Savings	$455,525
Average Annual Energy Cost Savings	$847
Average % of Energy Savings	37%

7.1.1.4.2 Low to Moderate Income Path

Low Moderate projects were limited to $3,000 or 15% minimum energy savings. Once a project met 15% energy savings (therms and kwh), no new upgrade measures were implemented. This means the low hanging fruit upgrades were always selected and deeper energy saving measures were not made.

Low to Moderate Income Statistics	
Total kwh Savings	1,497,101
Average of kwh Savings	1,821
Average of Percent KWH	19%
Total Therm Savings	241,513
Average of Therm Savings	294
Average of Percent Therms	37%
Annual Energy Cost Savings	$354,997
Average Annual Energy Cost Savings	$432
Average % of Energy Savings	31%

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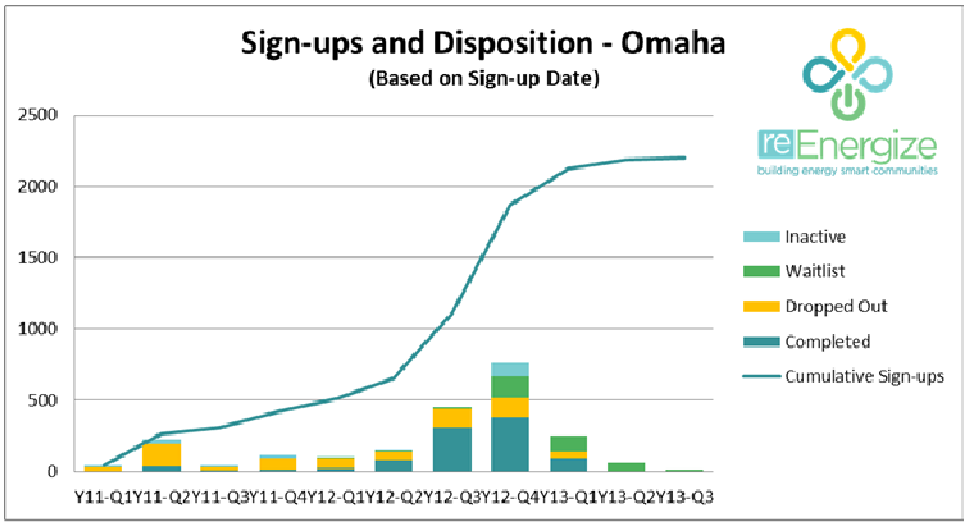
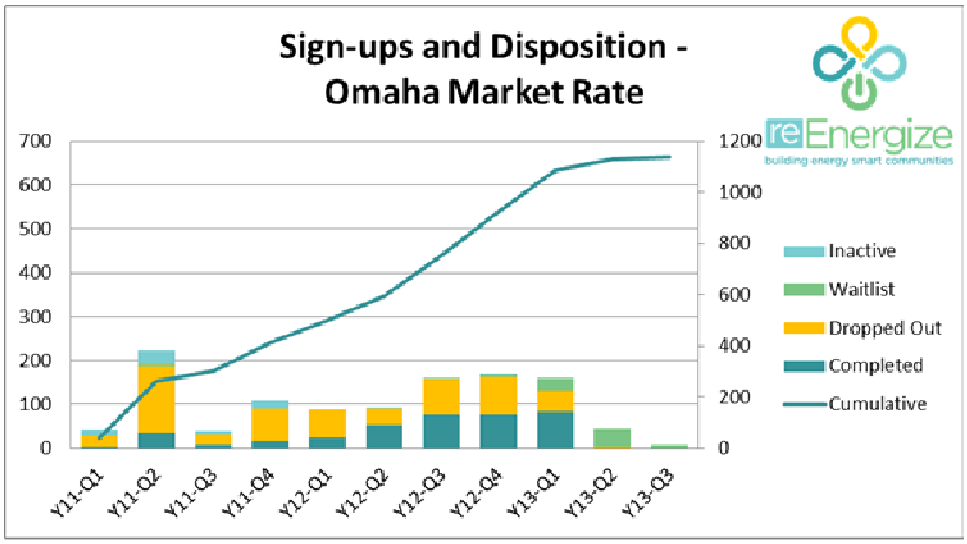
7.1.2 Residential Markets

Marketing and participant engagement efforts were the responsibility of the City of Omaha, and City of Lincoln offices. While both programs had success, results were different over time based on what outreach activities were conducted.

7.1.2.1 Omaha Sign-Ups



7.1.2.1.1 Omaha Sign-Ups, Market Rate



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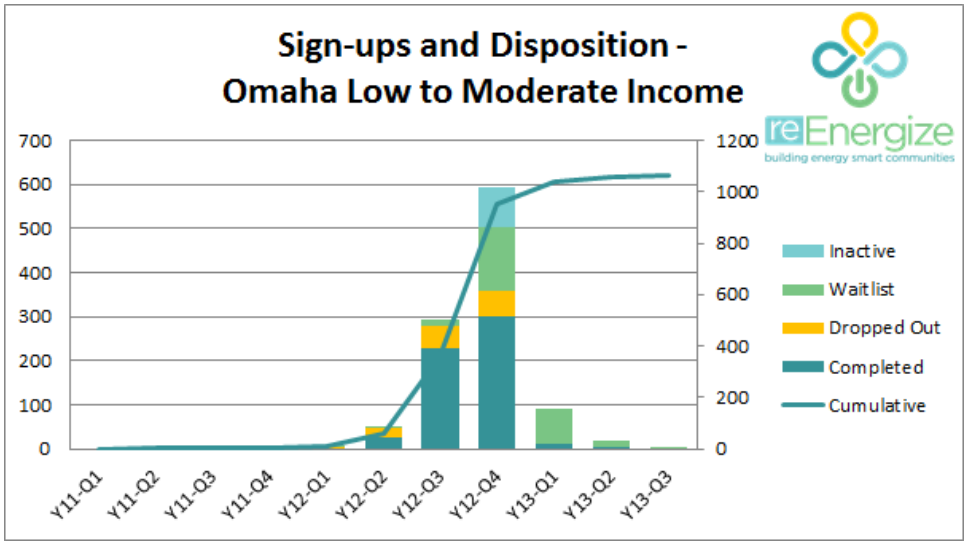
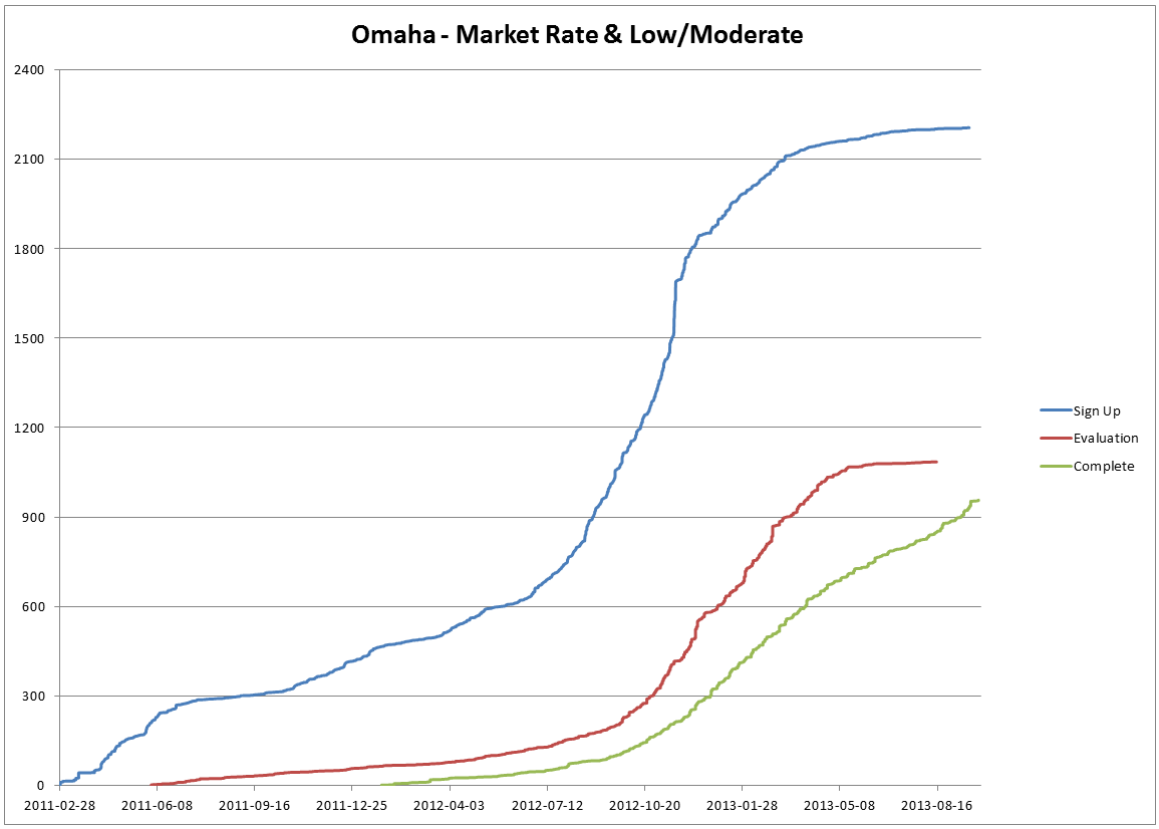
7.1.2.1.2 Omaha Sign-ups - Low to Moderate Income Path



7.1.2.2 Omaha Sign-Up, Evaluation, Completion Rates Over Time



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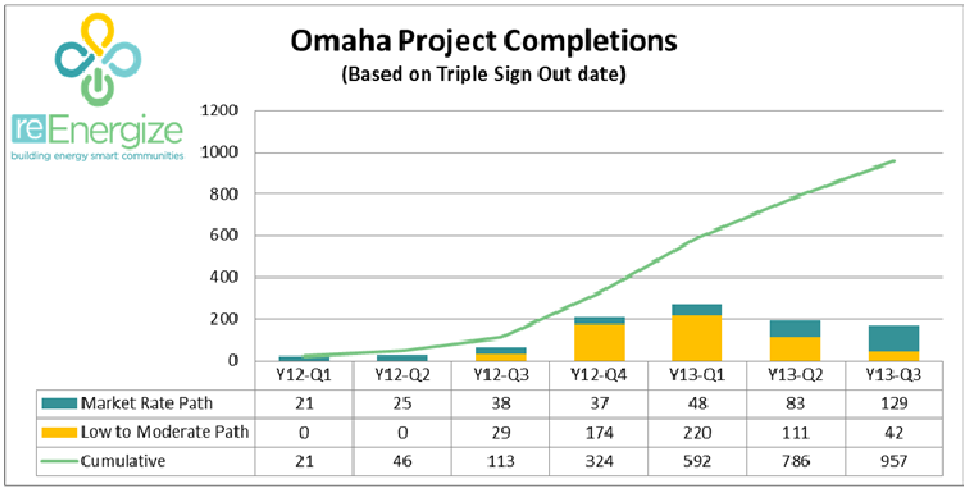
7.1.2.3 Omaha Completions

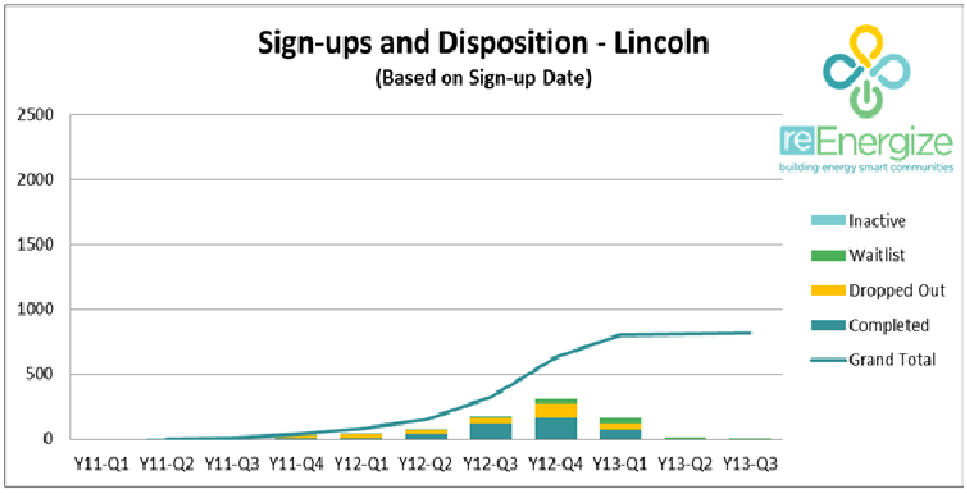


7.1.2.4 Omaha Energy Savings

Omaha reEnergize Energy Savings	Low Moderate Income	Market Rate	Total
Total kwh Savings	1,104,271	2,012,357	3,116,628
Average of kwh Savings	1,917	5,282	3,257
Average of Percent KWH	19%	36%	26%
Total Therm Savings	178,652	170,549	349,201
Average of Therm Savings	310	448	365
Average of Percent Therms	38%	33%	36%
Annual Energy Cost Savings	$262,281	$346,202	$608,484
Average Annual Energy Cost Savings	$455	$909	$636
Average % of Energy Savings	32%	37%	34%

7.1.3 Lincoln

7.1.3.1 Lincoln Sign-ups



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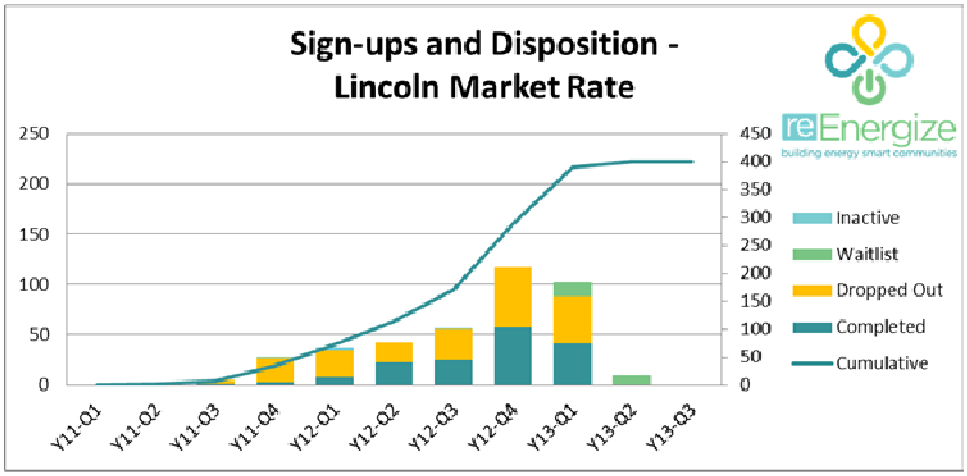
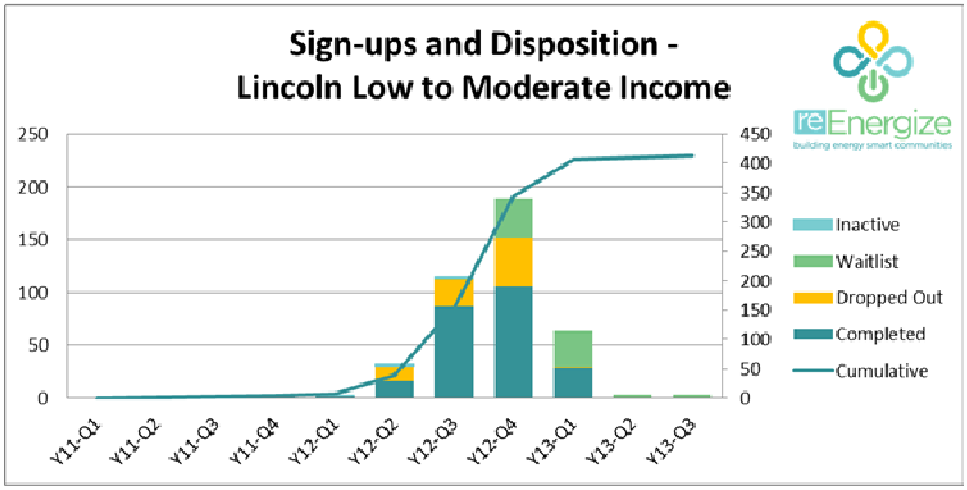
7.1.3.1.1 Lincoln Sign-Ups - Market Rate Path



7.1.3.1.2 Lincoln Sign-ups - Low to Moderate Income Path



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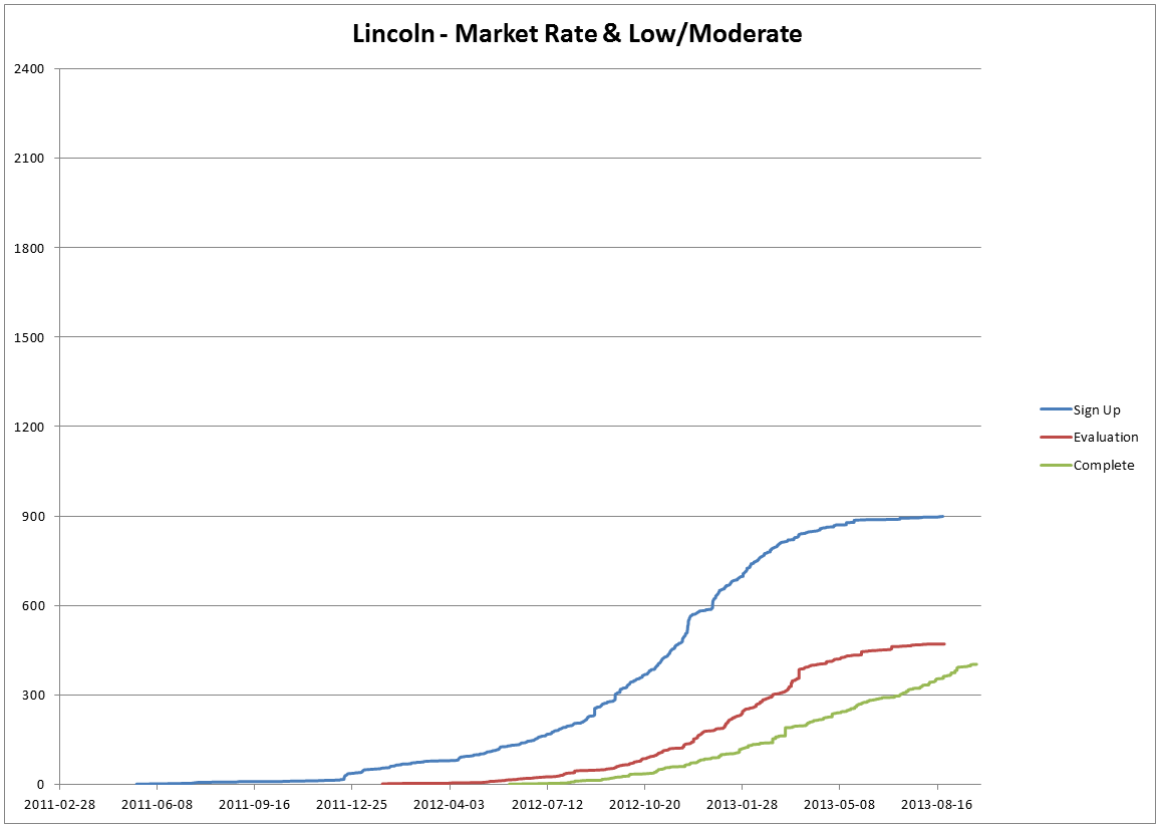
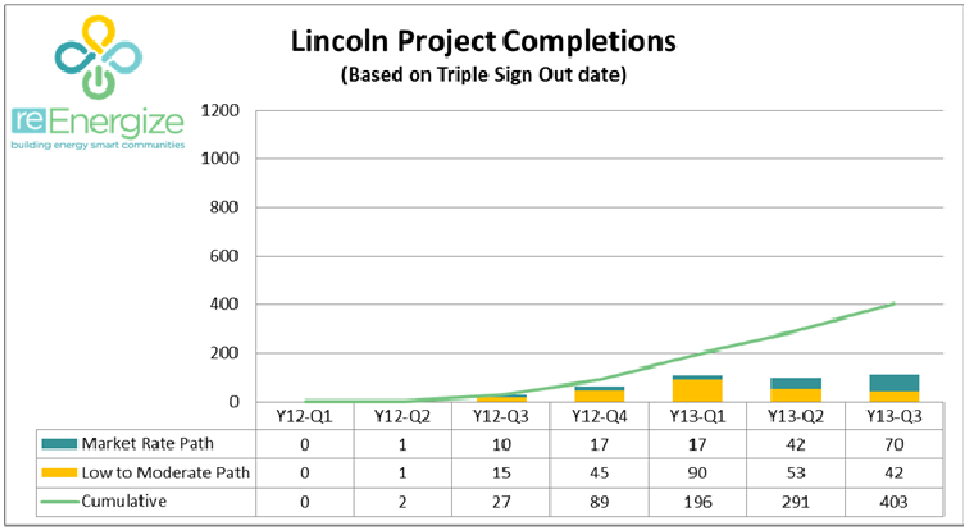
7.1.3.2 Lincoln Sign-Up, Evaluation, Completion Rates



7.1.3.3 Lincoln Completions



	Y12-Q1	Y12-Q2	Y12-Q3	Y12-Q4	Y13-Q1	Y13-Q2	Y13-Q3
Market Rate Path	0	1	10	17	17	42	70
Low to Moderate Path	0	1	15	45	90	53	42
Cumulative	0	2	27	89	196	291	403

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7.1.3.4 Lincoln Energy Savings

Lincoln reEnergize Energy Savings	Low Moderate Income	Market Rate	Total
Total kwh Savings	392,830	417,436	810,266
Average of kwh Savings	1,597	2,659	2,011
Average of Percent KWH	19%	25%	21%
Total Therm Savings	62,861	79,505	142,367
Average of Therm Savings	256	506	353
Average of Percent Therms	36%	41%	38%
Annual Energy Cost Savings	$92,715	$109,323	$202,038
Average Annual Energy Cost Savings	$377	$696	$501
Average % of Energy Savings	31%	37%	33%

7.2 Commercial / Nonprofit Program

Commercial project completion goals were reduced due to budget shift to the rapidly expanding residential program near the start of 2013. Projects which were signed up did have strong success with evaluation, advising, and the combined incentives with OPPD. Based on significantly less steps, the reporting metrics for commercial properties were significantly less elaborate than for residential projects.

7.2.1 Evaluation and Advising Path

The initial focus of the commercial path was on the evaluation and advising path. Contractors were able to very successfully market and complete these projects, and both contractors and participants reported significant satisfaction with this incentive.

Total completed evaluation and advising projects by market

- Omaha: 22
- Lincoln: 53

7.2.2 Lighting Incentive

Lighting projects were similarly limited based on available funding. These projects were extremely popular with both contractors and participants, and showed significant benefit to OPPD toward their commercial energy savings objectives.

Total reEnergize & OPPD lighting incentive projects:

- 84 projects completed

In addition to these projects, lighting contractors requested authorization for funding for several additional projects. It is unknown why those projects were not invoiced for reEnergize incentive funding, but based on the approved OPPD incentive forms, those projects are expected to have been completed even with additional funds.

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7.2.3 RTU Controller Incentive

The potential energy savings for RTU participants was by far the largest of any project in the reEnergize Program. Of the projects completed, all included multiple RTU controller units. The combined

- Total completed projects: 9
- Total RTUs upgraded: 48
- Total electric demand reduction: 214 kW
- Total electric consumption reduction: 685,501 per year

OPPD had targeted 100 completed RTU upgrades, but limited outreach and the grant funding deadline allowed for limited completion.

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8 Lessons Learned

8.1 Program Lessons

Many lessons can be taken from the program residential and commercial. First, in this market incentives were a main contributor in driving demand; in commercial it was a full cost coverage and in residential a skin-in-the-game strategy helped convert projects from start to complete. Overall, barriers to program participation existed with an undeveloped workforce from the start, low relative utility cost, a community that supports new housing versus assisting the retrofitting of older housing.

8.2 Residential Project Lessons

Incentives were effective at driving demand. The change in incentive models after the 5th quarter of actual program work offered some insights into what participants in the area were willing to do. The original program offered a maximum $3,500 from the participant with no limit on spending from the participant as long as the work was energy related and met the standards of our program -- including no do-it-yourself projects. The second form of incentive the program adopted was split into two paths: the “market rate,” which replaced the original form and the “low to moderate income” path, which was a new offering. The new offering for market rate gave participants the ability to choose their upgrades and do so by choosing smaller more “shallow” upgrade packages.

The typical package in the old offering would need to get over $3,500 in cost to kick in incentives for the work done, this usually meant deeper packages with more savings at a higher upfront cost. When the new version came out more incentive was offered at a lower up-front cost to the participant, new signups flooded in. The conclusion here is that participants were willing to sign up for the program with a lower buy in cost from them. Other conclusions may be that participants came into the program looking for specific upgrades like a furnace or attic insulation and filled out the upgrade package with lower cost/more cost effective upgrade packages. Below is a graph showing signups over the life of the program. New signups started to really pick up when the new program incentive package was offered.

Another conclusion can be made when comparing the low and moderate path and the market rate path from the new offering. The low moderate path gave participants the most cost-effective upgrades up to $3,000 in value for a $100 buy in. The market rate path asked for a considerable amount of up front buy in, $350 average for the evaluation test in, but this cost was refundable when the participant moved forward with upgrades. The conclusion here is that people liked having flexibility in their projects and were willing to pay for it. If the program truly wanted to install the most cost-effective items the incentive amount needed to be very generous.

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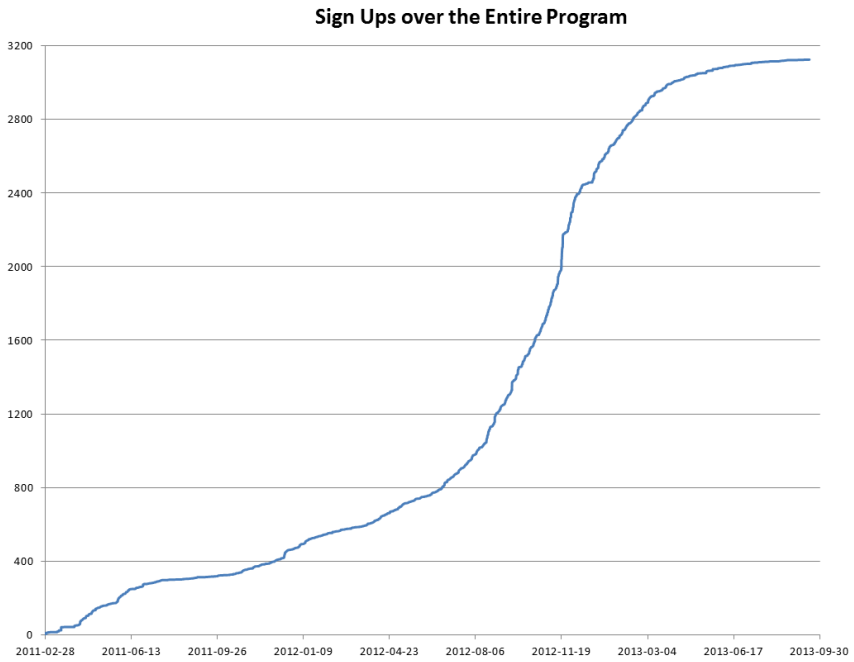
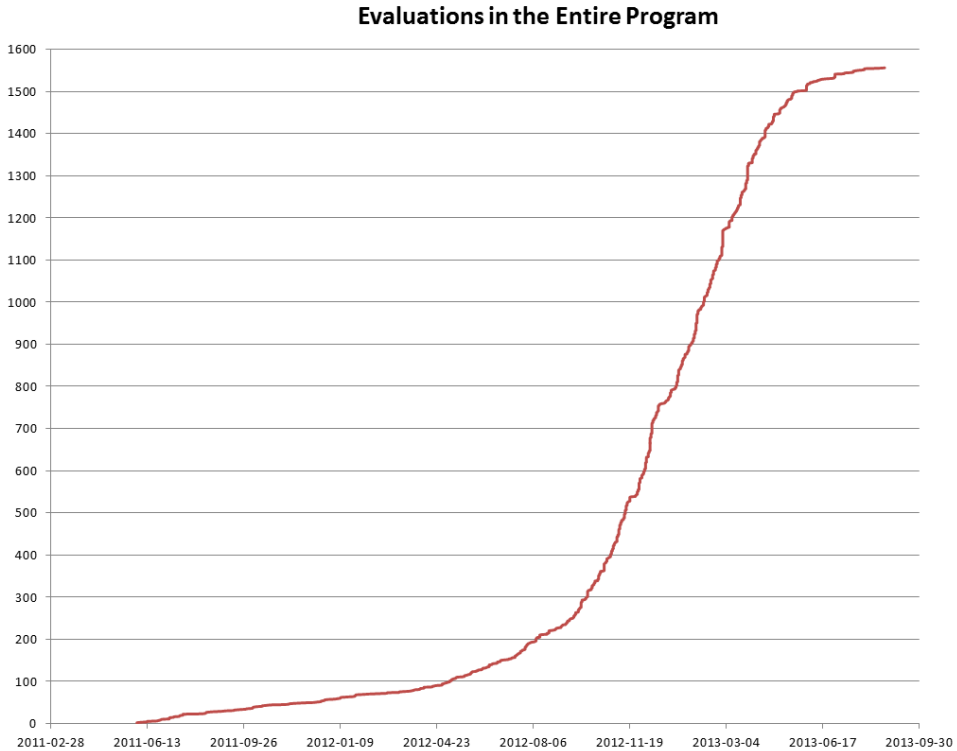


8.2.1 Evaluations

The reEnergize Program boasted a completion rate of 87.4% from evaluation to upgrade. This astoundingly high number of project completion rate, especially in such a new market, can be attributed to the "skin-in-the-game" strategy the program employed. Low/Moderate participants were required to pay the very low $100 fee and the program would cover the remainder of the cost of the evaluation and project work.



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9 Sustainability of the Market

The legacy of the reEnergize Program, at least at this time, is the Nebraska Home Performance Guild and the adoption of the 2012 energy code by the City of Omaha's Planning Department.

9.1 Nebraska Home Performance Guild

As the program neared its end in the summer of 2013, meetings were held with program staff and the workforce including reEnergize contractors and evaluators. Four workforce members took leadership roles in continuing the foundations reEnergize had set. At the meetings, program staff and workforce members used a charrette format to ascertain lessons learned and form strategies for the future.

Nebraska Home Performance Guild workgroup with reEnergize Program staff, October 2013.

Subjects ranging from logo design to the importance of contracts were discussed in these meetings. As of December 2013, a nonprofit organization was created with intentions of achieving 501(c)6 status, an oversight committee was appointed, a logo was developed, a workflow was in draft form, and at least 10 companies were involved. Membership qualifications were being discussed and until then an indicative count on members is not feasible. One proposed idea taken from experience with the reEnergize Program is to break contracting up into two groups, weatherization and HVAC. The reEnergize Program used a general contractor format to organize projects, which simplified contact for participants but may have created complications for contractors not familiar with HVAC or weatherization.

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This proposed format would allow participants to take the results of evaluation to experts in each field to get pricing.

Strong opinions of support and lessons learned came from the meetings conducted with staff and workforce, with a focus on future strategy and shared concern for the energy efficiency market in the area. The Nebraska Home Performance Guild has ridden a wave of momentum started by the reEnergize Program and is seeking to build from the positives and negatives it created.

9.2 City of Omaha Planning Department Ongoing Efforts

The City of Omaha expected to adopt IECC 2012 during the first quarter of 2014. This new code will require infiltration testing for new construction, which is strongly expected to have an impact on work for contractors in existing homes.

Equipment purchased by the reEnergize Program includes; blower door kits, an infrared camera, and additional smaller industry tools. These will remain with the Planning Department with intention of being available to help continue developing the market for evaluations and updates.

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10 Conclusions

By investing in building a market for evaluations and upgrades, grant funding will show continuing benefits. Initial investment helped to accomplish residential and commercial projects from contractors who completed training and developed experience. As these contractors to work in the market, additional customers will save energy and provide additional business development for an increasing workforce. Additional project completion can continue to decrease project costs, save energy and money for customers, and continue to build over time. Similar to compound interest from financial savings, "compound efficiency" from energy savings will have increasingly beneficial results long term. The following lessons represent some of the most significant principles learned from the reEnergize Program.

10.1 Markets are slow to develop

From the beginning the reEnergize Program set out to have long lasting effects on the whole-building energy market in Omaha and Lincoln and to not be a "flash-in-the-pan." Whole-home and building energy efficiency in the Omaha and Lincoln metro area was relatively undeveloped when the Retrofit Ramp-up grant was initially awarded in 2010. A select few engineering and architecture firms took interest in the commercial evaluation process and the residential market had a handful of qualified energy evaluators and zero qualified whole-home energy upgrade contractors in the market. Additionally barriers in this market include a relatively low kwh and therm cost, which does not motivate homeowners to save energy and development patterns and policy favor building new structures instead of putting money into older stock.

This program was not empowered to change development patterns or create pressure on homeowners with higher utility rates, it was however, empowered to help build a qualified workforce which will continue efforts into the future and it created demand from area building owners through education. Over 1,700 participants gained knowledge first hand from a qualified professional doing an evaluation in their own building's envelope. The generous incentives were meant to steer people into making upgrades right away, many took advantage of the incentives but even those that elected not to are now familiar with the concept of whole-building energy evaluation, advising, and contracting. Many of those newly-educated owners have made contributions to building the market when they purchase LED light bulbs from a local store, when they have a second evaluation when they are ready to move forward with upgrades, or when they tell their friends about the energy savings they are seeing from the attic insulation they put in themselves.

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10.2 Contractors can effectively sell their services

In quarter one through three of 2011 the program relied mainly on the contracted marketing team and zero on the contractors or evaluators themselves. As numbers of contractors began to rise in the following quarters, the program utilized this workforce to build their own marketing prowess and assisted them by providing materials like yard signs, t-shirts, pamphlets, and mass marketing. The workforce responded by attending neighborhood meetings, community functions, and walking door-to-door, which was successful and much of the program's rise in numbers can be attributed to this.

10.3 Incentives drive project conversion

A large part of the turnaround in signups and completions were due in part to the program changes that were made in the spring of 2012. A large part of the changes were an increase in incentives distributed to the participants. The low and moderate program began a meteoric rise once the word got out the program would cover over 95% of the cost to improve your home and the market rate program more methodically built participation as the low and moderate program phased out and the contractors focused in on these more market friendly projects.

10.4 Low energy costs mean longer return on investment

Nebraska's public utility policy was formed to create a source of low cost energy for the state. This low cost proved to make the savings in energy cost sales point a harder one to push. Although savings were still significant and paybacks usually were within a 10 year period, deeper, more extensive upgrade packages were harder to come by. Wall insulation and air conditioners were not the low hanging fruit for participants and therefore were not often selected.

10.5 Administration and coordination are crucial for continued market development

Major administration for the reEnergize Program was provided by City of Omaha employees who were funded by the grant. In August 2013, a budget for 2014 was adopted which did not include general funding to continue the Office of Sustainable Development. Grant funds provided staff time for project completion assistance through September 30th, 2013 and final grant reporting. The pace of project completion leading up until the very last possible days, and the lack of City staff specifically responsible to coordinate on going market growth, combine to represent a sudden end to an incentivized program with administrative personnel.

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reEnergize
building energy smart communities

reEnergize Energy Evaluation Agreement

This Agreement is made this _____ day of _____ in the year 20____ by and between the following parties,

OWNER:	EVALUATOR:
_____	_____
_____	_____
_____	_____

for services in connection with the following property,

_____	_____	_____
Address	City, State	ZIP

1. **THE WORK**. Evaluator shall provide all labor, materials, equipment and services necessary to complete the Work in accordance with Exhibit A attached hereto and incorporated into this Agreement.

2. **CONTRACT PRICE AND PAYMENT TERMS**. As full compensation for performance by Evaluator of the Work, Owner shall pay Evaluator the total amount of _____ ($_____). All payments shall be made within twenty-one (21) days of receipt of invoice for completed Work. The payment for evaluation is non-refundable, even if the Owner chooses not to have energy upgrade services contracted.

3. **INCENTIVE FUNDING AND ADDITIONAL PAYMENT.** As a participant in the reEnergize Program, Owner will receive benefits of the following incentive funding:

- $100 paid to Evaluator to help lower the cost of the evaluation
- $150 paid to Evaluator for a Test Out of work completion, safety, and health

Evaluator shall disclose any other expected payment from any other parties:

Payment from	Amount
_____	_____

4. **EVALUATOR'S RESPONSIBILITIES**. Evaluator shall be responsible for supervision and coordination of the Work, including the means, methods, techniques, sequences, and procedures utilized. All Work shall be completed in a timely and professional manner consistent with industry standards and practices for the type of work being performed at the property. Evaluator does not warrant or guarantee any energy savings in connection with the Work performed as part of the Agreement. Owner shall require any separate contractor employed by Owner to cooperate with Evaluator and assist with the coordination of activities. The Contract Price and shall be equitably adjusted, for changes made necessary by the coordination of construction activities.

5. **WARRANTY**. Evaluator, by executing this document, certifies that it has sufficient skill to conduct energy efficiency inspections with a high degree of quality and customer satisfaction. For the energy evaluation, Evaluator warrants that (a) it has the power and legal authority to enter into and perform this Agreement and to carry out the obligations described herein; (b) the making and performance of this Agreement by Evaluator will not violate any provisions of any federal, state, or local laws and will not result in the breach or violation of, or constitute a default under any current agreement or obligation under which Evaluator is bound.

6. **SITE CONDITIONS**. If the conditions at the Worksite are (a) subsurface or other physical conditions which are materially different from those represented by Owner, or (b) unusual or unknown physical conditions which are materially different from conditions ordinarily encountered and generally recognized as inherent in Work provided, Evaluator shall stop Work and give immediate notice of the condition to Owner. Evaluator shall not be required to perform any work relating to the unknown condition without the mutual agreement of the parties. Any change in the Contract Price as a result of the unknown condition shall be made by Change Order.

7. **SUBCONTRACTS/CONSULTANTS**. Subcontractors or Consultants may perform work not performed by Evaluator with its own forces. Evaluator shall notify Owner of all Subcontractors and/or Consultants used in performing the Work.

8. **INDEMNITY**. To the fullest extent permitted by law, Evaluator shall defend, indemnify and hold Owner, Owner's officers, directors, members, consultants, agents and employees harmless from all claims for bodily injury and property damage, other than to the Work itself, that may arise from the performance of the Work to the extent of the negligence attributed to such acts or omissions by Evaluator, subcontractors or anyone employed directly or indirectly by any of them or by anyone for whose acts any of them may be liable. Evaluator shall not be required to defend, indemnify or hold harmless Owner or others retained by Owner for any acts, omissions or negligence of Owner or others retained by Owner. To the fullest extent permitted by law, Owner shall defend, indemnify and hold harmless Evaluator, its officers, directors or members, subcontractors or anyone employed directly or indirectly by any of them or anyone for whose acts any of them may be liable from all claims for bodily injury and property damage that may arise from the performance of work by Owner or others retained by Owner, to the extent of the negligence attributed to such acts or omissions by Owner or others retained by Owner.

9. **MUTUAL WAIVER OF CONSEQUENTIAL DAMAGES**. Owner and Evaluator agree to waive all claims against each other for any consequential damages that may arise out of or relate to this Agreement. Owner agrees to waive damages including but not limited to Owner's loss of use of the Project, any rental expenses incurred, loss of income, profit or financing related to the Project, as well as the loss of business, loss of financing, principal office overhead and expenses, loss of profits not related to this Project, or loss of reputation. Evaluator agrees to waive damages including but not limited to loss of business, loss of financing, loss of profits not related to this Project, loss of bonding capacity or loss of reputation. The provisions of this Paragraph shall also apply to the termination of this Agreement and shall survive such termination.

10. **TERMINATION**. Upon seven (7) days' written notice to Owner, Evaluator may terminate this Agreement if the Work has been stopped for a thirty (30) day period through no fault of Evaluator. In addition, upon seven (7) days' written notice to Owner, Evaluator may terminate the Agreement if Owner fails to pay Evaluator in accordance with this Agreement or otherwise materially breaches this Agreement. Upon termination by Evaluator pursuant to this Agreement, Evaluator shall be entitled to recover from Owner payment for all Work executed and for any proven loss, cost or expense in connection with the Work, including all demobilization costs plus reasonable overhead and profit. Even after termination the provisions of this Agreement still apply to any Work performed, payments made, events occurring, costs charged or incurred or obligations arising before the termination date.

11. **DISPUTE RESOLUTION PROCESSES**. If a dispute arises out of or relates to this Agreement or its breach, the parties shall endeavor to settle the dispute first through direct discussions. If the dispute cannot be settled through direct discussions, the parties shall endeavor to settle the dispute by mediation under the current Construction Industry Mediation Rules of the American Arbitration Association before recourse to any binding dispute resolution procedures. If neither direct discussions nor mediation successfully resolve the dispute, the parties agree that arbitration shall be used to resolve the dispute. Arbitration shall be pursuant to the Construction Industry Rules of the American Arbitration Association unless the parties mutually agree otherwise. A written demand for arbitration shall be filed with the American Arbitration Association and the other party to the Agreement within a reasonable time after the dispute or claim has arisen, but in no event after the applicable statute of limitations for a legal or equitable proceeding has run. The arbitration award shall be final. This agreement to arbitrate shall be governed by the Federal Arbitration Act and judgment upon the award may be confirmed in any court having jurisdiction. The prevailing party in any dispute arising out of or relating to this Agreement or its breach that is resolved by a binding dispute resolution process shall be entitled to recover from the other party reasonable attorney's fees, costs and expenses incurred by the prevailing party in connection with such dispute resolution process as allowed by law.

12. **ASSIGNMENT**. Neither Owner nor Evaluator shall assign its interest in this Agreement without the written consent of the other except as to the assignment of proceeds. The terms and conditions of this Agreement shall be binding upon both parties,

their partners, successors, assigns and legal representatives. Neither party to this Agreement shall assign the Agreement as a whole without written consent of the other.

12. **GOVERNING LAW**. This Agreement shall be governed by the law in effect at the location of the Project.

13. **INSURANCE**. The insurance requirements necessary under this Agreement are provided in Exhibit B attached hereto and incorporated into this Agreement.

BOTH PARTIES HAVE READ AND UNDERSTAND THIS AGREEMENT INCLUDING THE EXHIBITS ATTACHED HERETO.

IN WITNESS WHEREOF, and intending to be bound thereby, the Parties have executed this Agreement effective as of the day and year set forth above:

OWNER	EVALUATOR
_____	_____
Signature	Signature
_____	_____
Print Name	Print Name
_____	_____
Date	Date

EXHIBIT A
reEnergize Energy Evaluation Agreement, "Work"

Description of Work to be performed by Evaluator:

The Evaluator shall perform an initial reEnergize Energy Evaluation of the Property including but not limited to items identified below:

- The Evaluator shall identify items that would reduce energy consumption, improve building health and safety, increase the lifespan of a building, and improve the quality of life and comfort for building occupants.

- The Evaluator shall provide results of the reEnergize Energy Evaluation to the Owner. The information provided will include a list of services recommended and the estimated energy savings of the service. This form will then be made available for to Contractor(s) to review and provide an estimated cost estimates cost to provide the energy upgrade.

- The results delivered by the Evaluator to the Owner shall include;
    - list of the most cost-effective energy upgrades
    - breakdown of kWh and therm savings for each upgraded
    - list of recommended upgrades totaling at least 15% total energy savings
    - the reEnergize Energy Workbook with Owner's property information entered, as well as the energy savings information for the recommended upgrades

- The Evaluator will be available for communication with the Contractor to ensure understanding of the recommended services.

- Once the upgrades are complete, the Evaluator will re-visit the Property to ensure proper completion of the services stated by the results of the reEnergize Energy Evaluation and the Exhibit A: reEnergize Energy Upgrade Agreement, "Work" as approved by the Owner, and Contractor.

Areas of reEnergize Energy Evaluation will include (but are not limited to) the following:

- **Attic Insulation**: Typically, blown-in cellulose is used for attic insulation. The Evaluator will calculate the existing R-value to determine if additional insulation is needed to increase R-value and provide energy savings in home. One inch of insulation increases the efficiency of the attic by approximately an R-value of 3.

- **Lighting**: Replacement of incandescent bulbs with energy efficient CFLs (Compact Fluorescents Lights, the curly ones) and/or LEDs (Light-Emitting Diodes) is a tremendous energy saving upgrade. CFL and LED bulbs last longer and use a fraction of the energy of a traditional incandescent bulb. Evaluators can assess the most cost-effective use of these lights as not all lighting must or should be replaced to witness dramatic energy savings.

- **Thermostats**: Programmable thermostats can automatically adjust the temperature in a residence. Savings typically occur during the day when people are out of the home and in the evenings while residents are sleeping. This device provides effective energy savings when programmed and used correctly.

- **Ductwork Improvements**: Generally ductwork in an unconditioned space will be checked for leaks and proper insulation. Ductwork in these areas will be completely sealed and additional insulation may be added for energy savings.

- **Sill Insulation** (also called "rim joist" insulation): The rim joist refers to the space between the underside of the floor and top of the basement wall. For optimal energy savings, this area must be properly sealed and insulated. The structural floor beams and siding alone offer minimal R-value.

- **Infiltration Reduction**: The Evaluator will use a blower door to pull a slight vacuum on the home to identify drafts and calculate leakage. Leaks will be identified and sealed. After major leaks are sealed another reading will be taken to project energy savings

- **Insulate Crawl Space**: Any space under a house that has limited access and is generally unconditioned should be properly air sealed and insulated. The walls, sill, and floor need to be insulated and sealed followed by the addition of a vapor barrier.

- **Furnace**: The Evaluator may suggest that a furnace/HVAC unit be serviced or replaced. This decision may be the result of one or many factors including, poor performance, cost-effectiveness, and health and safety factors based on Evaluator's findings.

- **Storm Windows**: Storm windows may be added to single pane windows. The aftermarket storm window will have combination screen and sliding storm on bottom. It will be constructed of aluminum and fastened to the exterior of the home.

- **Air Conditioner**: In certain situations, the A/C unit outside may need to be replaced. The Evaluator may recommend that the A/C be serviced, depending on the age and condition of the existing equipment.

- **Water Heater**: If a water heater is especially old of inefficient, it may be replaced to provide energy savings. Evaluator may recommend that a water heater wrap be placed, or that the water pipes be insulated to prevent energy loss.

- **Wall Insulation**: The Evaluator will determine if there is wall insulation installed, and if additional insulation will provide energy savings. The savings and comfort level are significantly improved when adding wall insulation to uninsulated or under-insulated homes.

Adding wall insulation can involve removing exterior siding, making a small hole in exterior wall, "filling" walls between studs with insulation, and reinstalling the siding. In some homes, Evaluator may recommend that insulation be added from the inside. In this case, a hole would be drilled through an inside wall, insulation would be added, and the hole would be plugged, patched, and painted.

- **Carbon Monoxide Monitor**: This is a general health and safety item, and will be recommended if one is not present in the home.

- **Dryer Vent**: An un-vented drier will be recommended to be properly vented to the outside, to avoid combustion gases and particulates from remaining in the home.

- **Boiler**: If the home is heated through a boiler system, this will be considered for potential tune-up, or replacement. Efficiency of a new boiler system is largely dependent on the existing system including pipes, and radiators.

- **Make Up Air Units**: If a home previously sealed particularly well, or recommended to be sealed, additional mechanical ventilation may be recommended to make sure that enough fresh air enters the home when combustion appliances are operating.

- Additional non-standard energy-related items as discussed between Owner and Evaluator including but not limited to,
    - tankless (on demand) water heater
    - asbestos removal or other health and safety items
    - additional construction work directly related to energy upgrade items
    - knob & tube wiring work

The following ADDITIONAL energy evaluation services have been agreed upon at the additional expense of the Owner:

Service	Cost
_____	_____
_____	_____

OWNER

_____
Signature

EVALUATOR

_____
Signature

EXHIBIT B
reEnergize Energy Evaluation Agreement, "Insurance"

The Evaluator shall obtain and maintain insurance coverage for the following claims which may arise out of the performance of this Agreement, whether resulting from the Evaluator's operations or from the operations of any Subcontractor, anyone in the employ of any of them, or by an individual or entity for whose acts they may be liable:

- workers compensation, disability benefit and other employee benefit claims under acts applicable to the Work;
- under applicable employers liability law, bodily injury, occupational sickness, disease or death claims of the Evaluator's employees;
- bodily injury, sickness, disease or death claims for damages to persons not employed by the Evaluator;
- personal injury liability claims for damages directly or indirectly related to the persons employment by the Evaluator or for damages to any other person;
- damage to or destruction of tangible property, including resulting loss of use, claims for property other than the work itself
- bodily injury, death or property damage claims resulting from motor vehicle liability in the use, maintenance or ownership of any motor vehicle; and

The Evaluator's Worker's Compensation, Commercial General Liability, and Automobile Liability Insurance shall be written for not less than the following limits of liability:

Evaluator's Workers Compensation and Employers Liability Insurance

- Workers Compensation Insurance in compliance with the requirements of the State of Nebraska
- Employer's Liability Insurance:
    - Bodily Injury by Accident: $100,000 Each Accident
    - Bodily Injury by Disease: $500,000 Policy Limit
    - Bodily Injury by Disease: $100,000 Each Employee
- Commercial General Liability Insurance
    - Each Occurrence Limit $1,000,000.00
    - General Aggregate $2,000,000.00
    - Products/Completed Operations Aggregate $1,000,000.00
    - Personal and Advertising Injury Limit $1,000,000.00
- Comprehensive Automobile Liability Insurance
    - Combined Single Limit Bodily Injury and Property Damage $500,000.00 Each Occurrence

Insurance may be arranged under a single policy for the full limits required or by a combination of underlying policies and an Excess or Umbrella Liability policy.

The policies shall name Owner as an additional insured. Certificates of insurance showing required coverage to be in force shall be filed with the Owner prior to commencement of the Work.

Products and Completed Operations insurance shall be maintained for a minimum period of one (1) year following the date of final payment.

OWNER'S LIABILITY INSURANCE. The Owner shall be responsible for obtaining and maintaining its own liability insurance (including any applicable property liability insurance as may be necessary to cover the property associated with this Project) in a form and amount acceptable to the Evaluator. Insurance for claims arising out of the performance of this Agreement may be purchased and maintained at the Owner's discretion. The Owner shall provide the Evaluator with a certificate of insurance at the request of the Evaluator.

reEnergize Energy Upgrade Agreement

This Agreement is made this _____ day of _____ in the year 20____ by and between the following parties,

OWNER:	CONTRACTOR:
_____	_____
_____	_____
_____	_____

for services in connection with the following property,

_____	_____	_____
Address	City, State	ZIP

1. **THE WORK**. Contractor shall provide all labor, materials, equipment and services necessary to complete the Work in accordance with Exhibit A attached hereto and incorporated into this Agreement.

2. **CONTRACT PRICE AND PAYMENT TERMS**. As full compensation for performance by Contractor of the Work, Owner shall pay Contractor the total amount of _____ ($_____). Owner will make payment to Contractor as described in Exhibit A prior to the start of the Work.

Contractor shall begin the scope of the Work immediately after receiving payment from Owner. At the conclusion of the Work, the reEnergize Program will pay Contractor on behalf of the Owner the incentive portion of the payment, as outlined in Exhibit A.

3. **CONTRACTOR'S RESPONSIBILITIES**. Contractor shall perform the Work in connection with the reEnergize Program only if they are prequalified according to guidelines set by the reEnergize Program.

Contractor shall be responsible for supervision and coordination of the Work, including the construction means, methods, techniques, sequences and procedures utilized. All Work shall be completed in a timely and professional manner consistent with industry standards and practices for the type of work being performed in the location of the work being performed. Contractor does not warrant or guarantee any energy savings in connection

with the Work performed as part of the Agreement. Owner shall require any separate contractor employed by Owner to cooperate with Contractor and assist with the coordination of activities. The Contract Price shall be equitably adjusted for changes made necessary by the coordination of construction activities.

Forty eight (48) hours prior to completion of the Work, Contactor shall call the Evaluator and schedule the Check Out to verify proper completion of the Work according to guidelines set by the reEnergize Program, the profession judgment of the Evaluator, and customer satisfaction of the Owner. If the Work is found deficient in any of these categories, Contractor will make corrections at its expense or risk termination of this Agreement without payment for services. Evidence shall be provided by Contractor, Evaluator, or Owner with respect to any claim regarding the completion or quality of the Work.

When the Work is completed, Contractor will sign Exhibit C – Check Out to indicate that they have completed the entire scope of the Work. Evaluator will sign Exhibit C to verify that the Work has been completed according to best practices for the residential energy efficiency industry. Owner will sign Exhibit C to indicate that they are satisfied with the Work as complete by Contractor. The signed copy of Exhibit C will be submitted to the reEnergize Program by Contractor to indicate completion and satisfaction of all parties.

4. **WARRANTY**. Contractor warrants that all materials and equipment shall be new unless otherwise specified, of good quality, and free from defective workmanship and materials. Contractor's warranty does not include remedies for defects or damages caused by normal wear and tear during normal usage, use for a purpose for which the Project was not intended, improper or insufficient maintenance, modifications performed by Owner or others retained by Owner, or abuse. The Contractor warrants its workmanship for a period not to exceed one (1) year from date of installation.

5. **SITE CONDITIONS**. If the conditions at the Worksite are (a) subsurface or other physical conditions which are materially different from those represented by Owner, or (b) unusual or unknown physical conditions which are materially different from conditions ordinarily encountered and generally recognized as inherent in Work provided, Contractor shall stop Work and give immediate notice of the condition to Owner. Contractor shall not be required to perform any work relating to the unknown condition without the mutual agreement of the parties. Any change in the Contract Price as a result of the unknown condition shall be made by Change Order.

6. **BUILDING PERMIT, FEES AND APPROVALS**. Contractor shall secure and pay for all permits, approvals, easements, assessments and fees required for the development, construction, use or occupancy of permanent structures or for permanent changes in existing facilities, including the building permit; unless otherwise addressed in the proposal.

7. **SUBCONTRACTS**. Subcontractors may perform work not performed by Contractor with its own forces. Contractor shall notify Owner of all Subcontractors used in performing the Work. Contractor shall not subcontract the entire scope of the Work, and shall perform some portion of the Work directly.

8. **CHANGES**. Contractor may request and/or Owner may order changes in the Work or the timing or sequencing of performance of the Work that impacts the Contract Price or the Contract Time. All such changes in the Work that affect Contract Time or Contract Price shall be formalized in a Change Order. Owner and Contractor shall negotiate in good faith an appropriate adjustment to the Contract Price and/or the Contract Time and shall conclude these negotiations as expeditiously as possible. Acceptance of the Change Order and any adjustment in the Contract Price and/or Contract Time shall not be unreasonably withheld. An increase or decrease in the Contract Price resulting from a change in the Work shall be determined as mutually agreed upon by the parties. Contractor shall not be obligated to perform Changed Work until Owner and Contractor have executed a Change Order.

Any Change Order shall be discussed with a representative of the reEnergize Program. Any additional scope of work that does not relate to energy efficiency shall be discussed separately and may be contracted between Owner and Contractor.

9. **INDEMNITY**. To the fullest extent permitted by law, Contractor shall defend, indemnify and hold Owner, Owner's officers, directors, members, consultants, agents and employees harmless from all claims for bodily injury and property damage, other than to the Work itself, that may arise from the performance of the Work to the extent of the negligence attributed to such acts or omissions by Contractor, subcontractors or anyone employed directly or indirectly by any of them or by anyone for whose acts any of them may be liable. Contractor shall not be required to defend, indemnify or hold harmless Owner or others retained by Owner for any acts, omissions or negligence of Owner or others retained by Owner. To the fullest extent permitted by law, Owner shall defend, indemnify and hold harmless Contractor, its officers, directors or members, subcontractors or anyone employed directly or indirectly by any of them or anyone for whose acts any of them may be liable from all claims for bodily injury and property damage that may arise from the performance of work by Owner or others retained by Owner, to the extent of the negligence attributed to such acts or omissions by Owner or others retained by Owner.

10. **MUTUAL WAIVER OF CONSEQUENTIAL DAMAGES**. Owner and Contractor agree to waive all claims against each other for any consequential damages that may arise out of or relate to this Agreement. Owner agrees to waive damages including but not limited to Owner's loss of use of the Project, any rental expenses incurred, loss of income, profit or financing related to the Project, as well as the loss of business, loss of financing, principal office overhead and expenses, loss of profits not related to this Project, or loss of reputation. Contractor agrees to waive damages including but not limited to loss of business, loss of financing, loss of profits not related to this Project, loss of bonding capacity or loss of reputation. The provisions of this Paragraph shall also apply to the termination of this Agreement and shall survive such termination.

11. **TERMINATION**. Upon seven (7) days written notice to Owner, Contractor may terminate this Agreement if the Work has been stopped for a thirty (30) day period through no fault of Contractor. In addition, upon seven (7) days written notice to Owner, Contractor may terminate the Agreement if Owner materially breaches this Agreement. Upon

termination by Contractor pursuant to this Agreement, Contractor shall be entitled to recover from Owner payment for all Work executed and for any proven loss, cost or expense in connection with the Work, including all demobilization costs plus reasonable overhead and profit. Even after termination the provisions of this Agreement still apply to any Work performed, payments made, events occurring, costs charged or incurred, or obligations arising before the termination date.

12. **DISPUTE RESOLUTION PROCESSES**. If a dispute arises out of or relates to this Agreement or its breach, the parties shall endeavor to settle the dispute first through direct discussions. If the dispute cannot be settled through direct discussions, the parties shall endeavor to settle the dispute by mediation under the current Construction Industry Mediation Rules of the American Arbitration Association before recourse to any binding dispute resolution procedures. If neither direct discussions nor mediation successfully resolve the dispute, the parties agree that arbitration shall be used to resolve the dispute. Arbitration shall be pursuant to the Construction Industry Rules of the American Arbitration Association unless the parties mutually agree otherwise. A written demand for arbitration shall be filed with the American Arbitration Association and the other party to the Agreement within a reasonable time after the dispute or claim has arisen, but in no event after the applicable statute of limitations for a legal or equitable proceeding has run. The arbitration award shall be final. This agreement to arbitrate shall be governed by the Federal Arbitration Act and judgment upon the award may be confirmed in any court having jurisdiction. The prevailing party in any dispute arising out of or relating to this Agreement or its breach that is resolved by a binding dispute resolution process shall be entitled to recover from the other party reasonable attorney's fees, costs and expenses incurred by the prevailing party in connection with such dispute resolution process as allowed by law.

13. **ASSIGNMENT**. Neither Owner nor Contractor shall assign its interest in this Agreement without the written consent of the other except as to the assignment of proceeds. The terms and conditions of this Agreement shall be binding upon both parties, their partners, successors, assigns and legal representatives. Neither party to this Agreement shall assign the Agreement as a whole without written consent of the other.

14. **GOVERNING LAW**. This Agreement shall be governed by the law in effect at the location of the Project.

15. **INSURANCE**. The insurance requirements necessary under this Agreement are provided in Exhibit B attached hereto and incorporated into this Agreement.

BOTH PARTIES HAVE READ AND UNDERSTAND THIS AGREEMENT INCLUDING THE EXHIBITS ATTACHED HERETO.

IN WITNESS WHEREOF, and intending to be bound thereby, the Parties have executed this Agreement effective as of the day and year set forth above:

OWNER	CONTRACTOR
_____	_____
Signature	Signature
_____	_____
Print Name	Print Name
_____	_____
Date	Date

EXHIBIT A
reEnergize Energy Upgrade Agreement, "Work"

EXHIBIT A: CONTRACTING WORKSHEET

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Participant	
ID	0
Name	0
Address	0
City	0
Zip Code	0
Phone Number	-
Email Address	0

Contractor	
Contractor Information	
Contractor Company	
Primary Contact (Name)	
Phone Number	
Email Address	
Today's Date	

Upgrades	Your Upgrades	Cost ($)
1 CO Detector (Health & Safety Item)		
2 Dryer vent (Health & Safety Item)		
3 Make-up Air Unit (Health & Safety Item)		
4 Fix natural gas leaks (Health & Safety Item)		
5 Infiltration Reduction		
6 Basement sill insulation		
7 Basement wall insulation		
8 Increase attic insulation with blown-in cellulose		
9 Increase attic insulation with closed-cell spray foam		
10 Increase attic insulation at the knee wall location		
11 Dense packed cellulose wall insulation		
12 Injection foam wall insulation		
13 Patching and painting interior walls for wall insulation		
14 Floor insulation		
15 Duct insulation in attic or unconditioned space		
16 Duct sealing for exposed ductwork		
17 Water heater wrap		
18 Water heater pipe insulation		
19 Water heater replacement		
20 Lighting improvements		
21 Replacement thermostat		
22 Boiler service		
23 Boiler replacement		
24 Furnace service or rebuild		
25 Furnace replacement		
26 Heat Pump service or rebuild		
27 Heat Pump replacement		
28 A/C service or rebuild		
29 A/C replacement		
30 Window A/C replacement		
31 Add Storm Windows		
32 Other:		

Next Steps:
Now that you have determined your upgrades and selected your contractor, you are ready to reEnergize your home! If you are using a financing option, please confirm that you are qualified for your portion of the contracted amount. Then, contact the reEnergize Program to let us know who you've selected as your contractor and if you made any changes to your list of selected upgrades. You may email us at info@reEnergizeProgram.org or call 877-402-5111. We will assign your contractor and they will contact you within 72 hours to schedule a time to perform your energy upgrades. Have this Contracting Worksheet handy as they will likely want to review your final selections over the phone. They will provide you three copies of the reEnergize Contractor Agreement to sign - one for you, one for them, and one to be sent to the Program. Print three copies of this Contracting Worksheet and attach it as Exhibit A to the Contractor Agreement. This will lock your selected upgrades, package cost, and reEnergize Incentive (as long as you do not make changes after the Contractor Agreement is signed.) After the Contractor completes their work, they will notify the Program and the Energy Evaluator will return to perform a Check Out.

COST SUMMARY		
Total Upgrade Package Cost	=	
minus Cost of Evaluation	-	
Adjusted Total	=	
minus reEnergize Upgrade Incentive	-	
Participant Due to Contractor	=	
reEnergize Program Due to Contractor*	=	

*reEnergize Due to Contractor = Cost of Evaluation + reEnergize Upgrade Incentive

SAMPLE

reEnergize Project Workbook Version 1.7 (Issued 7/2/2012)

EXHIBIT B
reEnergize Energy Upgrade Agreement, "Insurance"

The Contractor shall obtain and maintain insurance coverage for the following claims which may arise out of the performance of this Agreement, whether resulting from the Contractor's operations or from the operations of any Subcontractor, anyone in the employ of any of them, or by an individual or entity for whose acts they may be liable:

- workers compensation, disability benefit and other employee benefit claims under acts applicable to the Work;
- under applicable employers liability law, bodily injury, occupational sickness, disease or death claims of the Contractor's employees;
- bodily injury, sickness, disease or death claims for damages to persons not employed by the Contractor;
- personal injury liability claims for damages directly or indirectly related to the persons employment by the Contractor or for damages to any other person;
- damage to or destruction of tangible property, including resulting loss of use, claims for property other than the work itself
- bodily injury, death or property damage claims resulting from motor vehicle liability in the use, maintenance or ownership of any motor vehicle; and

The Contractor's Worker's Compensation, Commercial General Liability, and Automobile Liability Insurance shall be written for not less than the following limits of liability:

Contractor's Workers Compensation and Employers Liability Insurance

- Workers Compensation Insurance in compliance with the requirements of the State of Nebraska
- Employer's Liability Insurance:
    - Bodily Injury by Accident: $100,000 Each Accident
    - Bodily Injury by Disease: $500,000 Policy Limit
    - Bodily Injury by Disease: $100,000 Each Employee
- Commercial General Liability Insurance
    - Each Occurrence Limit $1,000,000.00
    - General Aggregate $2,000,000.00
    - Products/Completed Operations Aggregate $1,000,000.00
    - Personal and Advertising Injury Limit $1,000,000.00
- Comprehensive Automobile Liability Insurance
    - Combined Single Limit Bodily Injury and Property Damage $500,000.00 Each Occurrence

Insurance may be arranged under a single policy for the full limits required or by a combination of underlying policies and an Excess or Umbrella Liability policy.

The policies shall name Owner as an additional insured. Certificates of insurance showing required coverage to be in force shall be filed with the Owner prior to commencement of the Work.

Products and Completed Operations insurance shall be maintained for a minimum period of one (1) year following the date of final payment.

OWNER'S LIABILITY INSURANCE. The Owner shall be responsible for obtaining and maintaining its own liability insurance (including any applicable property liability insurance as may be necessary to cover the property associated with this Project) in a form and amount acceptable to the Contractor. Insurance for claims arising out of the performance of this Agreement may be purchased and maintained at the Owner's discretion. The Owner shall provide the Contractor with a certificate of insurance at the request of the Contractor.

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ENERGY EVALUATOR
SAFETY & ENERGY UPGRADE PROCEDURES (TEST IN)

The purpose of this document is to provide a general guideline of work for the Energy Evaluator. Please refer to the *Energy Evaluator Protocol and General Scope of Work* document for additional reference documents and procedures. **Use comment section at the end of the Evaluator Checklist to document findings from inspection and analysis sections of this procedure.**

1. Pre-Inspection

a. Ambient CO:
b. Outside Temperature:
c. Homeowner interview (issues and complaints, objectives, utility bills, base load calculations)

2. Exterior inspection

a. Any moisture issues (drainage plane, ponding, gutters, roof leaks, flashing, condensation, etc.)
b. Structural Issues (Sagging roof, uneven structure, cracks walls and foundation, rotted wood, etc.)
c. Safety Issues (Electrical, Asbestos, Mold etc.)
d. Location of Gas Lines + Combustion Gas Detection
e. Check for Thermal Bypasses high and low (intersecting roof lines, garages, porches, cantilevers)
f. Envelope penetrations in foundation, walls, roof allowing airflow (stack effect)
g. HVAC equipment (outdoor heat pump, A/C compressor, etc.)
h. Any possible pressure/air barrier issues (cracks in foundation, leaky windows, door weather stripping, etc.)
i. Types of Windows (single or double pane, wood, metal, condition, etc.)
j. Measure and sketch exterior dimensions of the building envelope

3. Interior inspection

a. Identify Health and Safety Issues
    - Identify moisture related problems (staining, mold, rot, moisture)make recommendations
    - Identify Indoor air contaminant sources (VOC pollutants, asbestos, CO, lead paint)make recommendations

- Identify fire and electrical hazards (flammables, structural paths (chases, balloon framing), make recommendations

b. Locate all thermostats, supply and return vents, range hoods, bathroom fans, dryer vents, etc.
c. Locate any fireplaces. Close dampers and doors. If unvented gas fireplace, recommend replacement for safety.
d. Identify and locate all Combustion Appliance Zones (CAZ), utility rooms, living space, attics, garage, crawlspaces
e. Identify space in and outside of thermal and pressure boundaries. Should be aligned and continuous. Make recommendations.
f. Inspect insulation type, amount, installation effectiveness, wind washing, baffles in attic.
g. Document heat loss implications (poor R or U values in windows, doors, attic hatches,) and savings opportunities.
h. Identify air sealing opportunities (attic, can lights, knee walls, soffits, chases, rim joist, floor) and make recommendations
i. Inspect ductwork for proper installation, leakage and air sealing, and insulation.
j. Check condition and fit of windows and doors, weather stripping and sealing.
k. Identify lighting types and appliance age and types for upgrade opportunities
l. IF NEEDED, measure and sketch interior dimensions of the building envelope

4. Calculate Square footage and volume from measurements in steps 1 and 2

House floor area: ☐

Avg. ceiling height: ☐

House volume: ☐

5. Combustion Appliance Zone (CAZ) Inspection and Preparation

a. Continually monitor CO in CAZ per Gold Sheet. Stop work if CO exceeds 35ppm.
b. Gas leaks found? If so, marked? (recommended repair before continuing) YES ☐ NO ☐
c. Kinked gas lines? YES ☐ NO ☐
d. Fittings date stamped prior to 1973? (recommend replacement) YES ☐ NO ☐
e. Identify types and BTU's of appliances (furnace, boiler, hot water heater)
f. Identify draft type and vent condition of combustion appliances (natural, induced, power, sealed)
g. If hydronic or steam system, identify supply and return piping and inspect for insulation and leaks.
h. Check water heater for safety valve, drip leg, blanket, temp setting, 6' pipe insulation

i. Check HVAC filters. Recommend regular replacement if excessively dirty

6. Combustion Appliance Zone Worst Case Depressurization (WCD) Test

a. Turn off all combustion appliances, switch water heater to pilot
b. Turn off all ventilation appliances (exhaust fans, range hoods, dryers, etc.)
c. Close all exterior doors/windows and open interior doors
d. Remove furnace filter before test if excessively dirty
e. Connect hose to lower left nozzle on pressure gauge (manometer) and direct hose outside.
f. Baseline the manometer
g. Turn on all exhaust fans, records measurement ☐ Pa

h. Turn on all air handler fans one at a time, then all at once to get worst negative pressure ☐ Pa

i. Open/close interior doors to increase negative pressure until Worst Case Depressurized. ☐ Pa

☐ Pa

j. WCD must be less negative (more positive) than CAZ depressurization limit below.

PASS ☐ **FAIL** ☐

k. FAIL? Include make-up air requirement in work scope

Combustion Appliance Zone (CAZ) Depressurization Limits	**Limit (Pa)**
Orphan natural draft water heater (including outside chimneys)	-2
Natural draft boiler or furnace commonly vented with water heater	-3
Natural draft boiler or furnace with vent damper commonly vented with water heater	-5
Individual natural draft boiler or furnace	
Mechanically assisted draft boiler or furnace commonly vented with water heater	
Mechanically assisted draft boiler or furnace alone, or fan assisted DHW alone	-15
Exhaust to chimney-top draft inducer (fan at chimney top)	-50
High static pressure flame retention head oil burner	
Sealed combustion appliances	

7. Combustion Appliance Zone Testing
(CAZ remains in Worst Case Depressurization (WCD))

Preparation

a. Drill holes in flue pipes 1'-2' after draft diverter/first elbow and in draft hood as needed
b. Determine BTU's smallest to largest on each vent. Start with lowest BTU Appliance

Spillage Testing

a. Grab mirror + stopwatch. Turn on appliance, test for spillage using mirror or smoke stick at every point. Spillage must stop within 60 seconds.
b. If spillage test fails, test spillage, draft and CO under Normal Conditions

Draft Testing

a. Reset manometer to reset baseline.
b. Use top left nozzle on pressure gauge (manometer) with metal tip in flue hole 1' to 2' from draft diverter
c. Calculate minimum flue draft pressure using Acceptable Draft Test Ranges chart.

Outside temperature (see step 1)		°F
Min Flue Draft Pressure calculated from chart		Pa
Draft reading (must be more negative)		Pa

d. If draft test fails under WCD, retest under natural conditions.

Acceptable Draft Test Ranges	
Outside Temp ^{o}F	Min Draft Pressure
<10^{o}	-2.5 Pa
10^{o} - 90^{o}	(Temp/40) -2.75
>90^{o}	-0.5

CO Testing

a. Ensure that CO reading is taken at steady state, or at 10 minute mark, whichever is first
b. Test for CO using CO Analyzer before the draft diverter so you are testing undiluted gases
c. Compare CO reading results to the table below and make recommendations accordingly

Compare Results from Combustion Appliances to this Table			
CO Test Result	and/or	Spillage & Draft Test Results	Action
0-25 ppm	and	Passes	Proceed with work
26-100 ppm	and	Passes	Recommend that the CO problem be fixed
26-100 ppm	and	Fails at worst case only	Recommend a service call for the appliance and/or repairs to the home to correct the problem **Stop**
100-400 ppm	or	Fails under natural conditions	**Work:** Work may not proceed until system is serviced and the problem is corrected
>400 ppm	and	Passes	**Stop Work:** Work may not proceed until system is serviced and the problem is corrected
>400 ppm	and	Fails under any condition	**Emergency:** Shut off fuel to the appliance and have the homeowner call for service immediately

Combustion Testing for Additional appliances

a. Test draft of each appliance independently under Worst Case Depressurization.
b. Fire all commonly vented appliances simultaneously and test for spillage, CO and draft.

Equipment ☐

Test for spillage (no spillage after 60 seconds)	Worst Case	Natural (if necessary)
	Pass☐ Fail☐	Pass☐ Fail☐
	Pass☐ Fail☐	Pass☐ Fail☐
	Pass☐ Fail☐	Pass☐ Fail☐

Test for draft ☐ Pa

Test for CO ☐ ppm

Equipment: ☐

Test for spillage (no spillage after 60 seconds)	Worst Case	Natural (if necessary)
	Pass☐ Fail☐	Pass☐ Fail☐
	Pass☐ Fail☐	Pass☐ Fail☐
	Pass☐ Fail☐	Pass☐ Fail☐

Test for draft ☐ Pa

Test for CO ☐ ppm

Equipment: ☐

Test for spillage (no spillage after 60 seconds)	Worst Case	Natural (if necessary)
	Pass☐ Fail☐	Pass☐ Fail☐
	Pass☐ Fail☐	Pass☐ Fail☐
	Pass☐ Fail☐	Pass☐ Fail☐

Test for draft ☐ Pa

Test for CO ☐ ppm

Ranges and Ovens

a. Remove any items from oven/range top
b. Make sure self-cleaning features are not activated
c. Open window or turn on exhaust fan
d. Operate oven for 5 minutes to achieve steady state
e. Test for CO at oven sleeve, before dilution air
f. Test range top for CO with all burners on high setting

Oven CO [ ] ppm Burner CO (6"above) [ ] ppm

Action Upon Test Results
100 ppm to 300 ppm as measured—you must install a carbon monoxide detector and recommendation for service must be made to the consumer. Greater than 300 ppm as measured—the unit must be serviced prior to work. If greater than 300 ppm after servicing, exhaust ventilation must be provided with a capacity of 25 CFM continuous or 100 CFM intermittent.

8. Blower Door Test
Means of measuring airflow, leakage, air changes and ventilation in a house

a. Turn off all combustion appliances, switch water heater to pilot
b. Turn off all ventilation appliances (exhaust fans, range hoods, dryers, etc.)
c. Open interior doors
d. Close all exterior doors/windows
e. Turn off all air handler unit fans
f. Make sure all fires are extinguished, cover/remove ashes

Do not conduct test if fire is not fully extinguished or IAQ issues are present.

g. Check for possible IAQ issues (mold, asbestos, etc.)
h. Setup Blower Door
    1. Fit frame to door & place red canvas over frame
    2. Insert frame to door, place Green hose 6-7 feet away from fan outside
    3. Insert fan into door, hook up power to fan
    4. Set up manometer (green - lower left to outside, red - upper right to fan)
    5. Ensure rings are installed in blower door opening before taking baseline reading
    6. Set mode to PR/FL @ 50, Set Device to BD3 and Set Config to Open.
    7. Baseline Manometer (BASELINE => START => wait 10 sec => ENTER)
    8. Remove rings from blower before operation
i. Operate Blower Door
    1. Turn up power until house is -50 Pa WRT Outside
    2. Record airflow in CFM at 50 Pa of pressure [ ] CFM_{50}
    3. Conduct room by room inspection with blower door running, check for airflow by hand or smoke stick
    4. Use pressure gauge to find isolate pressure differentials and leaks and recommend air sealing priorities

9. Calculations to determine BAS
Building Airflow Standard=the Amount of Ventilation the House Should Have

a. House Volume from step 4 _____ ft^3

b. Calculate Building Airflow = .35 x volume / 60 = _____ cfm

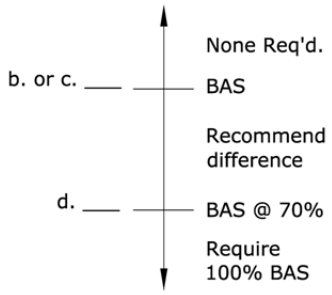
c. Calculate People Airflow = (# Bedrooms + 1) x 15 = _____ cfm
Between B and C, which is larger? (this is your BAS)

d. Multiply your BAS x .7 = _____ cfm

e. Enter your blower door reading from step 8 _____ CFM_{50}

f. Divide by N from chart below _____ cfm

g. Is Mechanical Ventilation recommended/required per BAS scale? _____ cfm



N-Factor Chart

Zone	# stories	1	1.5	2	3
1	Well-Shielded	18.6	16.7	14.9	13.0
	Normal	15.5	14.0	12.4	10.9
	Exposed	14.0	12.6	11.2	9.8
2	Well-Shielded	22.2	20.0	17.8	15.5
	Normal	18.5	16.7	14.8	13.0
	Exposed	16.7	15.0	13.3	11.7
3	Well-Shielded	25.8	23.2	20.6	18.1
	Normal	21.5	19.4	17.2	15.1
	Exposed	19.4	17.4	15.5	13.5
4	Well-Shielded	29.4	26.5	23.5	20.6
	Normal	24.5	22.1	19.6	17.2
	Exposed	22.1	19.8	17.6	15.4

N-Factor is what you use to convert from CFM_{50} to CFM_{Nat} and from ACH_{50} to ACH_{Nat}

10. Calculate Air Changes Per Hour

Blower door reading from Step 8= _____ CFM_{50}

House Volume from Step 4 = _____ ft^3

CFM_{50} x 60/Volume = _____ = ACH_{50}

ACH_{50}/N = _____ =ACH_{Na}

Home Type	ACH_{Nat}
Tight	0 - .35
New	0.35
Typical	.35 - .6
Leaky	.6 – 3.0+

11. Duct Sealing Analysis

a. While blower door is running, conduct dominant duct leakage test
b. While blower door is running, conduct duct leakage location diagnostics (prioritize repairs, state methods)
c. For duct sealing recommendations, please provide in the Duct Sealing item section of the Evaluator Checklist.

12. Air Sealing Analysis

Calculate BAS ventilation needs, air sealing and mechanical ventilation levels needed for work scope

a. Identify significant leakage in attic, cellar/crawl, and exterior wall, garage, etc. and how to seal.
b. Conduct zonal pressure analysis, prioritize air sealing, recommend solutions in work scope

13. Insulation Analysis

Determine insulation type and amount, and installation effectiveness

a. Make baffling and ventilation recommendations for wind washing, fire protection, boundary alignment.
b. Make specific recommendations for continuous alignment of air and thermal boundary.
c. Analyze structural considerations and their relationship to insulating and air sealing.
d. Identify cost-effective opportunities for insulation (specify savings calc., type and install technique).

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ENERGY EVALUATOR
SAFETY & ENERGY UPGRADE PROCEDURES (TEST OUT)

The purpose of this document is to provide a general guideline of work for the Energy Evaluator once Energy Upgrade Contractor has completed work.

Test Out Procedural Outline:

1. Identify need for WCD (Worst Case Depressurization) testing after modifications to the building shell have been made per standard
2. Identify need for CAZ (Combustion Appliance Zone) testing after energy evaluation work per standard
3. Conduct Blower Door testing after modifications to the building shell have been made per standard
4. Verify that Building Airflow Standard (BAS) has been met
5. Verify Air Changes Per Hour (ACH)

Pre-Inspection

a. Ambient CO: _____ b. Outside Temperature _____

1. Combustion Appliance Zone Worst Case Depressurization (WCD) Test

a. Turn off all combustion appliances, switch water heater to pilot
b. Turn off all ventilation appliances (exhaust fans, range hoods, dryers, etc.)
c. Close all exterior doors/windows and open interior doors
d. Remove furnace filter before test if excessively dirty
e. Connect hose to lower left nozzle on pressure gauge (manometer) and direct hose outside.
f. Baseline the manometer.
g. Turn on all exhaust fans, records measurement. _____ Pa
h. Turn on all air handler fans one at a time, then all at once to get worst negative pressure. _____ Pa
i. Open/close interior doors to increase negative pressure until Worst Case Depressurized. _____ Pa
j. WCD must be less negative (more positive) than CAZ depressurization limit below. **PASS** ☐ **FAIL** ☐

k. FAIL? Contact TSI Team

Combustion Appliance Zone (CAZ) Depressurization Limits	Limit (Pa)
Orphan natural draft water heater (including outside chimneys)	-2
Natural draft boiler or furnace commonly vented with water heater	-3
Natural draft boiler or furnace with vent damper commonly vented with water heater	-5
Individual natural draft boiler or furnace	
Mechanically assisted draft boiler or furnace commonly vented with water heater	
Mechanically assisted draft boiler or furnace alone, or fan assisted DHW alone	-15
Exhausto chimney-top draft inducer (fan at chimney top)	-50
High static pressure flame retention head oil burner	
Sealed combustion appliances	

2. Combustion Appliance Zone Testing
(CAZ remains in Worst Case Depressurization (WCD))

Preparation

a. Drill holes in flue pipes 1'-2' after draft diverter/first elbow and in draft hood as needed
b. Determine BTU's smallest to largest on each vent. Start with lowest BTU Appliance

Spillage Testing

a. Use a mirror and stopwatch. Turn on appliance, test for spillage using mirror or smoke stick at every point. Spillage must stop within 60 seconds.
b. If spillage test fails, test spillage, draft and CO under Normal Conditions

Draft Testing

a. Reset manometer to reset baseline.
b. Use top left nozzle on pressure gauge (manometer) with metal tip in flue hole 1' to 2' from draft diverter
c. Calculate minimum flue draft pressure using Acceptable Draft Test Ranges chart.

Outside temperature (see step 1) ☐ °F

Min Flue Draft Pressure calculated from chart ☐ Pa

Draft reading (must be more negative) ☐ Pa

d. If draft test fails under WCD, retest under natural conditions.

Acceptable Draft Test Ranges	
Outside Temp ^{o}F	Min Draft Pressure
<10^{o}	-2.5 Pa
10^{o} - 90^{o}	(Temp/40) -2.75
>90^{o}	-0.5

CO Testing

a. Ensure that CO reading is taken at steady state, or at 10 minute mark, whichever is first
b. Test for CO using CO Analyzer before the draft diverter so you are testing undiluted gases
c. Compare CO reading results to the table below and make recommendations accordingly

CO Test Result	and/or	Spillage & Draft Test Results	Action
0-25 ppm	and	Passes	Proceed with Test Out
26-100 ppm	and	Passes	Recommend that the CO problem be fixed
26-100 ppm	and	Fails at worst case only	Recommend a service call for the appliance and/or repairs to the home to correct the problem
100-400 ppm	or	Fails under natural conditions	**Stop Work:** Test Out may not proceed until system is serviced and the problem is corrected
>400 ppm	and	Passes	**Stop Work:** Test Out may not proceed until system is serviced and the problem is corrected
>400 ppm	and	Fails under any condition	**Emergency:** Shut off fuel to the appliance and have the homeowner call for service immediately

Combustion Testing for Additional appliances

a. Test draft of each appliance independently under Worst Case Depressurization.
b. Fire all commonly vented appliances simultaneously and test for spillage, CO and draft.

			Worst Case		Natural (if necessary)	
Equipment: ______________________						
Test for spillage (no spillage after 60 seconds)			Pass ☐	Fail ☐	Pass ☐	Fail ☐
Test for draft	__________	Pa	Pass ☐	Fail ☐	Pass ☐	Fail ☐
Test for CO	__________	ppm	Pass ☐	Fail ☐	Pass ☐	Fail ☐
Equipment: ______________________						
Test for spillage (no spillage after 60 seconds)			Pass ☐	Fail ☐	Pass ☐	Fail ☐
Test for draft	__________	Pa	Pass ☐	Fail ☐	Pass ☐	Fail ☐
Test for CO	__________	ppm	Pass ☐	Fail ☐	Pass ☐	Fail ☐
Equipment: ______________________						
Test for spillage (no spillage after 60 seconds)			Pass ☐	Fail ☐	Pass ☐	Fail ☐
Test for draft	__________	Pa	Pass ☐	Fail ☐	Pass ☐	Fail ☐
Test for CO	__________	ppm	Pass ☐	Fail ☐	Pass ☐	Fail ☐

Ranges and Ovens

a. Remove any items from the top of the oven/range
b. Make sure self-cleaning features are not activated
c. Open window or turn on exhaust fan
d. Operate oven for 5 minutes to achieve steady state
e. Test for CO at oven sleeve, before dilution air
f. Test range top for CO with all burners on high setting

Action Upon Test Results

100 ppm to 300 ppm as measured—you must install a carbon monoxide detector and recommendation for service must be made to the consumer. Greater than 300 ppm as measured—the unit must be serviced prior to work. If greater than 300 ppm after servicing, exhaust ventilation must be provided with a capacity of 25 CFM continuous or 100 CFM intermittent.

Oven CO _____ ppm Burner CO (6"above) _____ ppm

3. Blower Door Test
Means of measuring airflow, leakage, air changes and ventilation in a house

a. Turn off all combustion appliances, switch water heater to pilot
b. Turn off all ventilation appliances (exhaust fans, range hoods, dryers, etc.)
c. Open interior doors
d. Close all exterior doors/windows
e. Turn off all air handler unit fans
f. Make sure all fires are extinguished, cover/remove ashes

Do not conduct test if fire is present.

g. Setup Blower Door
    1. Fit frame to door & place red canvas over frame
    2. Insert frame to door, place Green hose 6-7 feet away from fan outside
    3. Insert fan into door, hook up power to fan
    4. Set up manometer (green - lower left to outside, red - upper right to fan)
    5. Ensure rings are installed in blower door opening before taking baseline reading
    6. Set mode to PR/FL @ 50, Set Device to BD3 and Set Config to Open.
    7. Baseline Manometer (BASELINE => START => wait 10 sec => ENTER)
    8. Remove rings from blower before operation
h. Operate Blower Door
    1. Turn up power until house is -50 Pa WRT Outside &
    2. Record airflow in CFM at 50 Pa of pressure _____ CFM_{50}
    3. Conduct room by room inspection with blower door running, check for airflow by hand or smoke stick
    4. Use pressure gauge to find isolate pressure differentials and leaks and recommend air sealing priorities

4. Calculations to determine Building Airflow Standard (BAS)
Building Airflow Standard = the Amount of Ventilation the House Should Have

a. House Volume from step 4 ____ ft^3

b. Calculate Building Airflow = .35 x volume / 60 = ____ cfm

c. Calculate People Airflow = (# Bedrooms + 1) x 15 = ____ cfm
Between B and C, which is greater? This is the BAS.

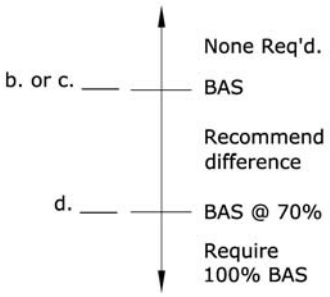
d. Multiply BAS x 0.70 = ____ cfm

e. Enter the blower door reading from step 8 ____ CFM_{50}

f. Divide by N from chart below ____ cfm

g. Is Mechanical Ventilation recommended/required per BAS scale? ____ cfm

If Mechanical Ventilation was required and not met after Test Out, contact TSI team.



N-Factor is used to convert

- CFM_{50} to CFM_{Nat}
- ACH_{50} to ACH_{Nat}

N-Factor Chart					
Zone	# stories	1	1.5	2	3
1	Well-Shielded	18.6	16.7	14.9	13.0
	Normal	15.5	14.0	12.4	10.9
	Exposed	14.0	12.6	11.2	9.8
2	Well-Shielded	22.2	20.0	17.8	15.5
	Normal	18.5	16.7	14.8	13.0
	Exposed	16.7	15.0	13.3	11.7
3	Well-Shielded	25.8	23.2	20.6	18.1
	Normal	21.5	19.4	17.2	15.1
	Exposed	19.4	17.4	15.5	13.5
4	Well-Shielded	29.4	26.5	23.5	20.6
	Normal	24.5	22.1	19.6	17.2
	Exposed	22.1	19.8	17.6	15.4

5. Calculate Air Changes Per Hour (ACH)

Blower door reading from Step 8 = _____ CFM_{50}

House Volume from Step 4 = _____ ft^3

CFM_{50} x 60 / Volume = _____ = ACH_{50}

ACH_{50} / N = _____ =ACH_{Na}

Home Type	ACH_{Nat}
Tight	0.0 - 0.35
New	0.35
Typical	0.35 - 0.6
Leaky	0.6 – 3.0 +

NOTES:
Energy Evaluator will complete a Test Out to verify that the Energy Upgrade Contractor has completed all of the work.

Energy Evaluator will sign the Triple Sign Out form upon successful completion of the Test Out.

BPI TEST OUT FAILURE PROCEDURE

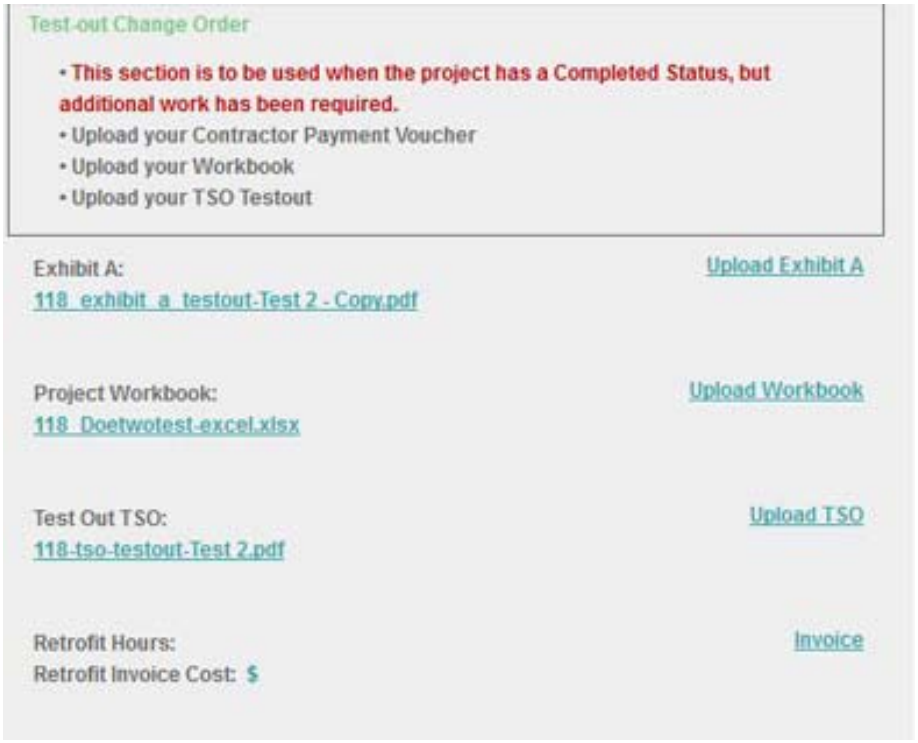
In the event of a failure during BPI test out, additional measures will be required to make the home safe. The evaluator is responsible for making recommendations and setting a scope to resolve the failure issues. Please follow the procedure listed below:

- Once best practices are determined for resolving failure, see protocol below.
- If Low to Moderate (L to M): Contractor by prescription of the Evaluator to record bid(s) for item(s) in workbook, along with quote proposals from subcontractor. Documents are to be uploaded to property page and "YES" is selected for justification if required. TSI and either City of Omaha or Lincoln Sustainability staff reviews and approves final scope of work and final approved workbook is issued back to the Contractor to perform the scope of work for items related to the Test Out failure. Once work is completed, a re-test out will be scheduled and performed to ensure passing of property.

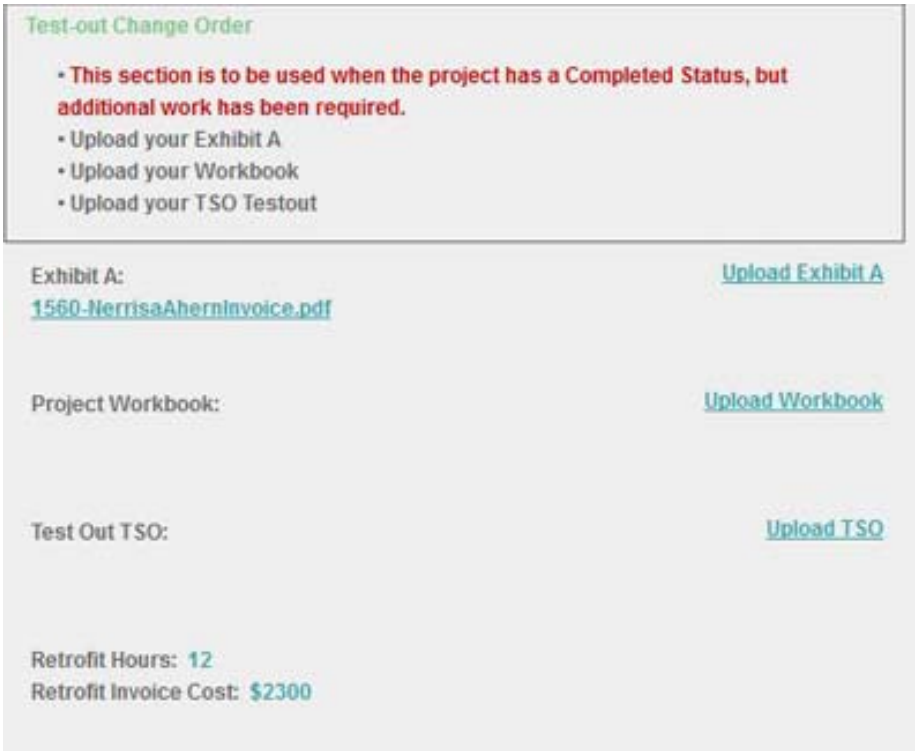
- If Market Rate (M/R), Evaluator prescribes items in workbook. Participants request bids from Contractor(s) for the prescribed item(s) and records item(s) in workbook. Participant chooses Contractor to perform the scope work for items related to the Test Out failure. Once work is completed, a re-test out will be scheduled and performed to ensure passing of property.

- A change order invoice should be submitted. See attached screen shots for ALL related Test Out Change Order information and their locations.

Low to Moderate



Market Rate



APPENDIX A – ADDITIONAL TEST OUT PROTOCOL

It is recommended the Evaluator complete test outs in the following order to maximize time and reduce need for full test out repetition should the project not be complete.

- Examine work order items for completion.
- Conduct final blower door.
- Complete CAZ testing.

The project is not considered complete until all items on the work order are completed to the satisfaction of the customer, test-out evaluator, and contractor and the CAZ diagnostics pass.

In the event the Upgrade Contractor orders the test out by the Energy Evaluator *prior* to job completion, the Evaluator may be eligible for additional test out fees for the additional visits to the home for test out procedures. Please document additional visits and rationale and upload to the MegaTool with Exhibit C and input the amount for the full test out and additional change order test-outs. Without documentation of the additional visits, the change order test out fees will not be approved by the program.

During the reEnergize program period, this $50 fee per additional visit will be paid by the program.

Should the second test out by the Evaluator indicate that the contractor did not complete the scope, the Program reserves the right to examine the project for quality and completion. The Program will make an effort to provide feedback to the contractor to improve performance as well as make decisions on a case by case basis which could include removing contractor from the project and reassigning project to another contractor.

Should Energy Evaluators and Upgrade Contractors fail to comply with the standards set forth in the Program, reEnergize has the right at any time to terminate the Evaluator and/or Contractor’s participation in the program and access to reEnergize participants.

reEnergize Energy Upgrade Agreement

EXHIBIT C – "Check Out"

Building ID _____ **Address** _____

Contractor
The Work outlined in Exhibit A has been completed according to the best practices for home energy upgrades.

_____ _____
Signature Date

_____
Print Name

Evaluator
The Work has been completed by Contractor according to Exhibit A, and follows best practices for energy efficiency, health, safety, and comfort.

_____ _____
Signature Date

_____
Print Name

Participant
I am satisfied with the work as completed by Contractor, and checked by Evaluator.

_____ _____
Signature Date

_____
Print Name

DISCLAIMER FOR MARKET RATE PROJECTS ONLY:

In the event of a failure(s) during the **TEST OUT** procedure, the Evaluator must provide all pertinent information to the participant regarding the failure(s). Recommended measures to remedy the failure(s) must be presented to the participant after the **TEST OUT** procedure. It must be understood by the participant that the Program will not assist in the cost of said measure(s).

Participant
I understand and decline the recommended measures provided to me by the Evaluator.

Signature _____ Date _____

Print Name _____

Participant
I understand and accept the recommended measures provided to me by the Evaluator.

Signature _____ Date _____

Print Name _____

Contractor
The **TEST OUT** Change Order Work outlined in **Exhibit A** has been completed based on recommended measure(s) according to the Evaluator.

Signature _____ Date _____

Print Name _____

Evaluator
The **TEST OUT** Change Order Work has been completed by Contractor according to **Exhibit A**, and follows recommended measure(s) according to the Evaluator.

Signature _____ Date _____

Print Name _____

Participant
I am satisfied with the **TEST OUT** Change Order Work as completed by Contractor, and checked by Evaluator.

Signature _____ Date _____

Print Name _____

Concurrence
PARTICIPANT SUMMARY

Evaluator: Larry Wright
Date Sent: 29-Dec-11

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PARTICIPANT INFORMATION

Name	[redacted]
Address	
City	Omaha
Bldg ID	64

EXISTING ENERGY USAGE RESULTS

	Usage		Cost per unit		Annual Utility Cost
Annual kwh	9,552	*	0.08	**	$764
Annual Therms	779	*	0.85	**	$662
Conversion to Total MMBtu -->	110		Total Cost -->		$1,426
Energy Intensity -->	74,332		= total energy used/home's square footage		

UPGRADE-BASED ENERGY USAGE RESULTS

	Usage		Cost per unit		Annual Utility Cost
Annual kwh	8,795		0.08	**	$704
Annual Therms	643		0.85	**	$547
Conversion to Total MMBtu -->	94		Total Cost -->		$1,250

Annual Estimated Energy Savings*** -->	15%	Annual Estimated Cost Savings -->	$176

* based on Annual data received from OPPD and MUD for previous 12 month period

** based on the cost per kwh and per therm in 2011. Does not include monthly service costs and other fees.

*** The minimum required Annual Estimated Energy Savings is 15%. If selection is less than 15%, then the program incentive funds cannot be offered.

FINANCIAL INVESTMENT

		Notes:
Total Estimated Project Cost =	$2,081	Based on the Total Cost of Selected Upgrades
minus Participant Pre-payment -	$100	Paid upon Enrollment
minus reEnergize Program incentive -	$1,000	The total amount of incentive is based on the Annual Estimated Energy Savings. The minimum required 15% energy savings will result in a $1000 incentive. An additional incentive of $100 is provided for each additional whole percentage point of savings achieved. There is no maximum out of the pocket cost for a participant. The minimum Cost of Project to Participant is $500.
TOTAL DUE FROM PARTICIPANT-->	$981	= Total Estimated Project Cost - Pre-payment -Incentive

RETURN ON INVESTMENT

Cost of Project to Participant	$1,081	= Total Due + pre-payment
Annual Estimated Cost Savings	$176	= Existing Annual Utility Cost - Upgrade-Based Annual Utility Cost
Simple Payback (years)	6.14	= Estimated Cost/Estimated Savings

CONCURRENCE

The payment from Participant is based on an estimated cost for time and materials associated with contracted upgrade work. The actual amount of the upgrade will not be determined until after the reEnergize Program has solicited project bids from pre-qualified contractors. The reEnergize Program provides assurance to the participant that, should the cost of the project exceed the estimate, no additional funds will be requested from the participant. In the case that the bid cost comes in lower than the estimate, the City will issue a voucher to the participant as a refund for overpayment.

To move forward on this project, please mark you concurrence with the recommended measures in the space provided and sign. Then, remit the payment listed below to reEnergize Program, City of Omaha, 1819 Farnam Street, Suite 311, Omaha NE 68183. **IMPORTANT: Please make checks out to "City of Omaha" and insert "reEnergize Program" on the memo line.** Once the payment is received, the reEnergize Program will proceed with bidding out the recommended project work.

☒ I concur with the recommended energy upgrades identified for my property and give permission to the reEnergize Program to solicit bids from pre-qualified energy upgrade contractors and to perform the required work.

Signature [redacted] Date 2/15[redacted]

Within 14 days of receipt, please sign and send this document and a check for the "Total Due From Participant" to:

reEnergize Program
City of Omaha
1819 Farnam Street, Suite 311
Omaha, NE 68183

Selected Energy Upgrade Package

Name	Stuart Shell
Address	3435 Webster Street
City	Omaha
Building ID	64

Utility Data:	Units	Rate	Estimated Annual Cost[1]
Annual kwh	9,552	0.08	$764
Annual Therms	779	0.85	$662
Energy Intensity	74,332		$1,426

X/O[2]: This column is pre-filled with your Proposed Upgrades, marked with an "X". "O" indicates an upgrade that was identified but not selected as the most efficient or cost-effective. On the interactive worksheet, you may change boxes marked with an "O" to an "X", or "X" to "O" to see how your package could changed based on your selected package. Note that the Program Incentive is based on the Proposed Package, the most cost-effective option as recommended by the Energy Evaluation. The Energy Evaluation and CO Detector, which is an important safety device, cannot be changed. Changing the "X" and "O" will change the data in the "Selected" columns and on the "Participant Summary" worksheet.

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	Upgrades	X/O	Est. Cost per Upgrade	Proposed Pkg Cost	Selected Pkg Cost	Savings per Upgrade	Proposed Pkg Savings $	Selected Pkg Savings $	KWH Saved per Upgrade	Proposed Pkg KWH Saved	Selected Pkg KWH Saved	Therms Saved per Upgrade	Proposed Pkg Therms Saved	Selected Pkg Therms Saved	Est Simple Payback per Upgrade (Yrs)[3]
DONE	Energy Evaluation	REQ	500	500	500	0	0	0	0	0	0	0	0	0	NA
1	CO Detector														
2	Dryer Vent														
3	Make Up Air Unit														
4	Replacement thermostat(s)	X	297	297	297	22	22	22	0	0	0	26	26	26	13.42
5	Lighting Improvements	X	168	168	168	61	61	61	757	757	757	0	0	0	2.77
6	Seal up house	X	810	810	810	61	61	61	0	0	0	72	72	72	13.24
7A	Increase attic floor insulation with blown-in cellulose	O	823	823		41	41		0	0		48	48		20.18
8	Basement sill insulation														
9	Duct insulation in attic or unconditioned basement or crawl														
10	Pipe insulation for hot water/heat	X	6	6	6	7	7	7	0	0	0	8	8	8	0.95
11	Water Heater Wrap														
12	Water Heater Flush and Element														
13	Foam Wall Insulation	O	4,650			202			0			238			22.99
14	Storm windows														
15	Heating system service or rebuild														
16	Heating system service or rebuild for electric and heat pumps	X	300	300	300	26	26	26	0	0	0	30	30	30	11.76
17	Furnance Replacement														
18	AC system service or repair														
19	AC system replacement														
20	Water heater replacement (Health & Safety: CO @ 31 ppm)	O	1,573			19			0			22			84.10
21	Solar Hot Water Heater (if selecting, choose only 20 or 21)	O	3,146			51			0			60			61.68
22	Other: Increase Attic Insulation with two-part foam	O	4,486			34			0			40			131.94
		TOTAL		2,905	2,081		217	176		757	757		184	136	See Summary[4]

NOTES:

1 Does not include service costs, taxes, fuel surcharges and other non-unit costs

2 X = Recommended Upgrades
O = Optional Upgrade Not Selected for Participant
<blank> = Not Applicable/Not Needed

3 Denotes that program incentive has not been factored into the simple payback calculation for individual upgrades

4 Denotes that Simple Payback for the total package of Energy Upgrades is provided in the Return on Investment section of the Summary Document.

2/15/12

COMMERCIAL ENERGY EVALUATOR
SCOPE OF WORK

Commercial Respondents selected to this RFP will be required to conduct energy evaluations for the reEnergize Program for selected facilities. The following scope of work applies for facilities evaluated under the reEnergize Program.

Pre-Enrolment Activities

All pre-energy evaluator activities will be completed prior to the selection of an energy evaluator. The following work below is not part of the energy evaluators scope of work and is for informational purposes only in understanding the overall evaluation process.

- For each prospective facility applying to participate in the program, the following documentation must be collected to pre-screen the facilities:
    - A minimum of 12 months of gas and electrical consumption
    - Number of PCs and employees
    - Weekly hours of operation
    - Facility address
    - Square footage
    - Type of facility
- The following information will be helpful in assigning energy evaluators to with facilities that best fit their strengths and experiences.
    - Age of facility
    - Type of building controls system (full DDC system, programmable thermostats, ect.)
    - Brief building system description

Before beginning any project work, all program participants must take participate in a program orientation that will be conducted by the TSI team. The orientation will be conducted as a webinar.

Planning Phase Activities

- Once an evaluator has been selected and assigned facilities to evaluate, the following existing building information shall be collected by the evaluator through the reEnergize Tool:
    - A minimum of 12 months of gas and electrical utility data. This information shall include demand and consumption data as well as information containing the utility rate schedule.
    - Hours of operation

  - Building System Description
- The evaluator shall be responsible for assembling copies of utility bills from the building owner as well as relevant existing building documents such as drawings, TAB reports, and previous energy studies. Review the utility bills for opportunities to obtain better rates through the utility rate schedule. Note if a specific month's bills are missing, use a monthly average in that case.
- When utility data is not available the Evaluator shall complete an as-built energy model to develop a baseline utility consumption case for the facility. The baseline model shall closely reflect the as-built conditions and operating schedules for the facility. This energy model can be completed using either E-Quest or Trane Trace 700 Energy Modeling software. The as-built model shall be used to develop, at a minimum, annual utility consumption data for gas and electric consuming systems within the facility.
- Conduct an initial site visit and interviews with facility operators and occupants. During the site visit, the Evaluator shall gather enough information to provide an initial list of Energy Conservation Measures (ECMs) and complete an initial description of the facility and its supporting mechanical, electrical, and architectural systems.
- Begin to complete Green Checklists during the initial site visit.
- During the initial site visit the following additional existing building information shall be collected by the evaluator:
  - Operations and maintenance plans for the facility.
  - Maintenance records and comfort complaint information.
  - Existing building mechanical, electrical, and architectural documents.
  - For facilities with a DDC controls system, controls submittal and sequence of operation for building mechanical systems.
- Provide a written description of the facility operation through the reEnergize database. The written description of the facility shall include a complete description of the following equipment and systems found within each evaluated commercial facility:
  - HVAC Systems
  - HVAC Control
  - Lighting and Lighting Control
  - Domestic Water Heating
  - Plumbing fixtures
  - Building Envelope
  - Miscellaneous energy consuming systems such as refrigeration, computers, and other process based equipment. Also note how this equipment is plugged i.e.(receptacle, plug strip, smart plug strip)
  - Hours of HVAC and Lighting system operation for weekdays and weekends.
- Develop an Initial Evaluation Report based on the information collected during the planning phase activities. The Initial Evaluation Report will identify the primary energy consuming equipment within the facility and provide documentation of the Evaluator's understanding of facility operations and its potential for Energy Conservations Measures (ECMs). The report will outline

detailed energy evaluation tasks that will guide the Investigation Phase and includes the following components:

- Executive Summary.
- Brief facility description which includes a baseline comparison of energy consumption and overall facility which includes temperature set points and occupied hours of operation.
- Calculated Energy Utilization Index (EUI) with comparison to peer facility.
- Description of potential ECMs and associated energy savings estimates in kWh and Therms.
- Preliminary implementation cost estimates and simple payback for each ECM.
- Discussion of low cost / no cost measures that can be implemented by in house staff or completed by the evaluator.

Investigation Phase Activities

- Perform a detailed site investigation. During this site visit, a thorough investigation of the energy consuming equipment of the facility will be completed. The tasks to be completed during the detailed site investigation shall include the following:
  - Walk the entire facility examining all major energy systems including: building envelope and façade, lighting, HVAC, domestic water heating, building controls, and plug loads.
  - Record nameplate information for existing energy consuming equipment to include: manufacturer, model, capacity, operating schedule and set points. Similar data shall be collected for lighting systems and plug load equipment as well.
  - Fill out and complete Green Checklist for each facility (incorporate typed Green Checklist into your report using the examples provided.
- Based on information gathered during the detailed site investigation, develop a list of ECMs that includes but is not limited to low cost/no cost conservation measures. For each ECM developed, the following information shall be thoroughly documented.
  - Description of ECM
  - Accurate and documented installation costs
  - Estimated energy savings (KW, kWh, Therms, gal. water)
  - Estimated annual energy cost savings
  - Estimate of utility rebates available
  - Estimated annual operating cost savings including O&M costs
  - Simple payback
  - For projects larger than 30,000 GSF a life cycle cost analysis must be completed for ECMS that result in payback of 6 years or greater.
  - Detailed scope of work needed to successfully implement ECM

- Cost estimates should reflect current market costs and must be obtained directly from owner, vendor, or accepted estimating source such as R.S. Means Construction Data.
- Develop a Calculation Plan detailing assumptions, calculation methodology, supporting calculations and interactions between ECM energy savings calculations for all ECMs developed on the project**.**
- Provide Final Energy Evaluation Report detailing the overall findings of the project. The Final Energy Evaluation Report shall include the following items at a minimum:
    - Executive Summary
    - Facility operation and system description
    - An estimation of the overall potential to reduce the facility's energy consumption.
    - Analysis of ECMs which includes prioritized list of ECMs based on life cycle cost analysis (based on 20 year life cycle). List of recommended ECMs should be displayed in order of lowest life cycle payback.
    - Detailed description and documentation for individual ECMs. This shall include a description of the ECM and an implementation plan for each ECM.
    - Calculation Plan
    - Completed Implementation costs for each ECM
    - Incentive Calculations (if applicable)
    - Written sequence of operation or operating changes for low cost / no cost ECMs.
    - Discussion on the buildings existing O&M plan and whether or not a plan needs to be developed further.
- Provide Draft Final Energy Evaluation Report to TSI team member for review and approval.
- Provide Final Report to Implementation Advisor for delivery to the owner representative.
- Conduct one meeting with participant to discuss the results of the Final Energy Evaluation Report and answer any questions regarding suggested ECMs and prioritization for future implementation and capital projects.

Implementation Phase Activities

- Provide completed Green Checklist to the Advisor for incorporation into the Sustainability Plan.
- Attend Implementation Planning Meeting with Advisor and participant.
- Review the implementation RFP provided by the Advisor. The RFP for implementation shall be reviewed to verify the scope of services within the RFP will meet the implementation requirements outlined within the Final Energy Evaluation Report.

Project Schedule Milestones

Project Task	**Completed By**
Initial site visit with owner	2 weeks after notice to proceed (NTP)
Complete Initial Evaluation Report	3 weeks following NTP
Detailed Site Visit	5 weeks following NTP
Deliver draft Energy Evaluation Report	7 weeks following NTP
Deliver Final Evaluation Report	9 weeks following NTP

COMMERCIAL ENERGY ADVISOR
SCOPE OF WORK

Near the end of the investigation phase and beginning of the implementation phase the Commercial Energy Advisor plays a critical role in guiding the building owner. The ultimate goal of the Advisor is to assist the building owner with implementing the measures identified in the evaluation that make the most sense for them. The Advisor will also provide strategic guidance for a Sustainability Action Plan. The Advisor shall not be an employee of a company contracted to install the suggested ECMs or be an employee of the firm performing the energy evaluation.

Pre-Implementation Planning Meeting Activities

- Advisor shall review the Draft Energy Evaluation Report, analyze the Green Checklists to identify opportunities, and provide feedback to TSI regarding additional information required.
- Advisor shall review the approved Final Energy Evaluation Report and speak with the evaluator to assure a proper understanding of the report's findings. Advisor will prepare a Cover Letter.
- Advisor shall deliver the Cover Letter, Final Energy Evaluation Report, and Implementation Planning Meeting Agenda to the building owner.
    - Prior to delivering the documents the Advisor will call building owner for an introduction, confirm delivery details, coordinate Implementation Planning Meeting date/time, and confirm meeting attendees.
    - Advisor shall notify TSI and Evaluator upon delivery.

Implementation Planning Meeting

- Advisor will schedule a 2-hour implementation planning meeting with the evaluator and program participant. The Energy Evaluator, Building Owner, Other Stakeholders, and Advisor are expected to attend. At the implementation planning meeting the following items shall be discussed:
    - Goals of the reEnergize Program
    - A Definition of Sustainability
    - Determining your Decision-making Hierarchy (Triple Bottom Line)
    - High-Level Overview of Evaluation Findings
    - Overview of the Evaluation Process
    - Applying your Decision-making Hierarchy to the Findings
    - Develop a Project Implementation Priority Matrix

- Outline Next Step Actions

Post-Implementation Planning Meeting Activities

- Advisor shall document the discussion and decisions from the Implementation Planning Meeting in the form of a Sustainability Action Plan. The Sustainability Action Plan will document the owner's targeted activities (short, mid, and long-term) and decision-making criteria. It will identify the owner's internal team (if applicable) along with their roles and responsibilities as it relates to the action plan. It will outline the Next Step Actions in appropriate detail such that the owner will be able to implement the items.
- If appropriate, Advisor shall develop and solicit RFPs for the measures to be implemented. Depending on the measures selected for implementation some engineering services may be required by local codes to complete the work. A sample RFP for engineering services will be provided to aid in this process.
- The Advisor will also guide the building owner through the process of seeking bids from qualified contractors to complete the implementation phase of the project. Sample RFPs for procuring contractor work to implement the measures will be provided to aid in the selection process.
- The Advisor will consult with Leverage Partners on the results of the bidding process for further input on financing options. Advisors will assist businesses in filling out applications for incentives and low-cost loans (from the Nebraska Energy Office). Note: The Nebraska Energy Office currently offers 2.5% loans for energy efficiency projects and 5% loans for some waste reduction projects.
- The Advisor shall work with the program participant to define an appropriate construction schedule for the implementation work, if appropriate.

Project Schedule Milestones

Pre-Implementation Planning Meeting Activities	1 week after approved Final Energy Evaluation Report
Conduct Implementation Planning Meeting	3 weeks after approved Final Energy Evaluation Report
Deliver Sustainability Action Plan	4 weeks after approved Final Energy Evaluation Report
Other Post-Implementation Planning Meeting Activities	As appropriate

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ENERGY EVALUATOR
WORKFORCE QUALIFICATIONS AND STANDARDS

In general, Energy Evaluators must:

- Comply with EPA and DOE rules and regulations.
- Comply with the National Historic Preservation rules and regulations.
- Perform and maintain background checks on all on-site employees and subcontracted employees, assuring no criminal history or drug use background that could indicate a potential threat to residents and/or program staff.
- Provide payment and/or reimbursement policies.
- Have access to laptop computer or handheld device with mobile (cellular) internet access that allows inputting data to the database.
- Have general computing skills including, but not limited to, internet, Excel, Microsoft Word
- Have an e-mail address.
- Have an operable cell phone.
- Have a valid driver's license and working vehicle.
- Have a blower door with appropriate software, a carbon monoxide (CO) and noxious gas detector. Access to additional trade-specific tools—such as a duct blaster and infrared camera—are encouraged but not a requirement.

The following outlines general standards for workforce qualifications for Energy Evaluators for the reEnergize Program.

- Energy Evaluators will have sufficient skills to conduct energy efficiency inspections with a high degree of quality and customer satisfaction.
- In some cases, specific professional certifications and/or training may be required for evaluator pre-qualification. At a minimum, Energy Evaluators will be required to adhere to the performance standards and requirements set by the reEnergize Program as outlined by the technical documents.
- All Energy Evaluators must understand the knowledge, skills, and abilities as set forth in the *Waste Reduction and Safety Protocol,* the *Energy Evaluator Protocol and General Scope of Work,* and this document.
- All Energy Evaluators must understand the knowledge, skills, and abilities as set forth in the most recent *Workforce Guidelines for Home Energy Upgrades* as developed by the Department of Energy. This document is currently in draft form and under continued development, but is expected for future use as criteria for pre-qualifications in latter stages of the reEnergize Program.

Position Overview:
The Energy Evaluator is expected to complete an evaluation of each residential unit as assigned by the reEnergize Program Technical Services Implementation (TSI) Team. All accurate estimates of time, costs, and savings must be recorded in the reEnergize Program database to ensure success of the project. In addition, a work order will be developed for the contractor that outlines the specific items required to complete the energy upgrade. The Energy Evaluator will be available for communication with the Energy Upgrade Contractor to ensure understanding of the work order. The TSI team will be conducting quality control on a percentage of the residential energy evaluations through various means including, but not limited to, accompanying the Energy Evaluator, talking with customers, and monitoring savings results.

Energy Evaluator Job Qualifications & Expectations:
An Energy Evaluator is an analyst who evaluates buildings for their energy efficiency as well as their relative health, safety, and comfort for occupants through empirical data. They do this by gathering measurements, conducting specific on-site tests and using energy software. Energy Evaluators identify areas for energy upgrades while improving health and safety, thereby reducing energy consumption, increasing the lifespan of a building and improving the quality of life and comfort for building occupants.

Required Certification:
An Energy Evaluator must have at minimum one of the following certifications:

- **Building Performance Institute (BPI) - Building Analyst**
- **RESNet - HERS**
- **RESNet - HEA**
- **Home Energy Assessors (HEA – Department of Energy)**

Training courses are available from various Nebraska Community Colleges, Metropolitan Community College, certain trade associations, and the Building Performance Institute (http://www.bpi.org/schedules_training.aspx).

Energy Evaluators may use any DOE-approved evaluation software for this project including, but not limited to, NEAT and/or REMRate. All data, however, must be input into the reEnergize Program database, which does expect familiarity with standard energy savings calculations. Evaluators are expected to attend and participate in additional training as required to maintain certifications.

Energy Evaluators are expected to have the ability and capacity to complete evaluations in a timely fashion as indicated by the reEnergize Program. Furthermore, Energy Evaluators should expect to complete post-upgrade quality control inspections for all homes evaluated in the awarded bundle. Finally, Energy Evaluators should understand they will be subject to quality control checks as indicated in the *Energy Evaluator Scorecard and Quality Control* technical document.

Small Business:
Energy Evaluators are encouraged but **not required** to be listed with the City of Omaha as an Emerging Small Business (ESB) or Small Business (SB). Listing as Tier I or Tier II can make you eligible for other contracting opportunities with the City of Omaha.

Applications for Tier I and Tier II can be found at the City of Omaha's Contract Compliance website, http://www.cityofomaha.org/humanrights/contract-compliance. For more information please contact the City of Omaha's Human Rights and Relations Division (402) 444-5055.

Additional Energy Evaluator requirements:

- Submit DUNS (Data Universal Numbering System) with application.
- No criminal history or drug history.
- Submit documentation for company safety program along with reEnergize Program application.
- Comply with the Davis-Bacon Wage Act.
- Comply with the Living Wage Ordinances of Omaha and Lincoln
- Comply with all applicable laws and regulations of the Federal Government as well as state and local government jurisdictions.
- Carry general liability insurance in the amount of $1,000,000 or greater.
- Carry automobile liability insurance of $500,000 per accident.
- Carry Nebraska Workers' Compensation Insurance (statutory).
- Provide all goods and facilities necessary to perform the work, including labor, materials, tools, equipment, utilities, general supervision and transportation.
- Agree to accept responsibility for the following: (i) cleaning up of rubbish and debris after completion of work and removal of same from the premises, including but not limited to cleaning of walls, floors and other surfaces soiled during the performance of the work; (ii) drywall and/or plaster patching/painting as required adjacent to the work area, and all glass breakage occurring adjacent to or within the work area; and (iii) any damage to property by energy evaluators and their employees while on-site at reEnergize participant's property.
- Have the capacity to maintain production and adequate cash flow while awaiting payment according to *Master Energy Evaluator Agreement*, Article 4.1.2.
- Comply with regular quality control evaluations by the TSI team.

Regulatory Compliance:
The reEnergize Program requires compliance with:

- American Recovery and Reinvestment Act of 2009, http://www.energy.gov/recovery.
- Department of Energy, http://www.doe.gov.
- Energy Efficiency and Conservation Block Grant requirements, www1.eere.energy.gov/wip/guidance.html.
- Federal Acquisition Regulation guidelines, http://www.acquisition.gov/Far.
- Omaha Emerging Small Business (ESB) or Small Business (SB) Program http://www.cityofomaha.org/humanrights/contract-compliance.
- Existing environmental regulations that pertain to the scope of work.

Energy Evaluator Application

Thank you for your interest in the reEnergize Program. If you are an Energy Evaluator and would like to receive more information about the program, please complete and submit the adjacent form.

Please Note: Application submission does not guarantee contracting with the reEnergize Program. It is not the intention of this program to be 100% of the energy evaluator's total workload for their company.

Step 1: Enter Contact Information

Company Name: *

Contact Name: *

Title:

Address: *

City: * **State:** * NE **Zip:** *

Phone: *

Additional Phone:

Email: *

Service Area: *

Website:

Year Founded: *

 # Employees: *

* required

Continue »

reEnergize Program
1819 Farnam Street, Suite 311
Omaha, NE 68183

Contact reEnergize »
Toll Free: (877) 402-5111
info@reEnergizeProgram.org

Join our email list to receive general updates about the program.

Join

Energy Evaluator Application

Step 2: Complete Application

Please answer the following questions to the best of your ability.

Services (check all that apply): *
- Single Family (1-4 units)
- Multi-Family (5+ units)

Submit documentation for company safety program. The last step in the application process will allow you to upload your documents to the reEnergize Program website.

Please answer the following questions to the best of your ability. The questions numbered below coincide with the categories on the *Energy Evaluator Scorecard*:

1. Number of Energy Evaluations (also known as audits) in residential sector completed in the last 12 months:

List projects that you have completed in the past 12 months (include names, addresses, phone numbers, and dates projects were completed):

2. Please provide a list of the company's three (3) most recent customers with contact information. Attach a brief lett of recommendation and evaluation results. Along with copies of energy evaluation reports on each property. The las step in the application process will allow you to upload your documents to the reEnergize Program website.

Name: Phone Number:

Name: Phone Number:

Name: Phone Number:

3. Relevant Education and Certifications

a. Multiple certifications (BPI, RESNet, HEA): *

b. Additional certifications such as BPI heating, and Air Conditioning or envelope specialist:

c. First Aid Training: * Yes No

d. CPR Training: * Yes No

e. OSHA Training: * Yes No

f. Environmental training around such issues as mold and related indoor air quality, lead, asbestos & radon: *
Yes No

Additional Questions:

Please provide certification of the energy evaluators that will be working on this project (HERS, BPI, etc.):

Evaluator 1

Name of Energy Evaluator: *

Certification (check all that apply): *
- RESNET Home Energy Rater
- BPI Building Analyst Professional
- Other

Certification #: *

Years of Experience conducting home energy evaluations: *

Evaluator 2

Name of Energy Evaluator:

Certification (check all that apply):
- RESNET Home Energy Rater
- BPI Building Analyst Professional
- Other

Certification #:

Years of Experience conducting home energy evaluations:

Evaluator 3

Name of Energy Evaluator:

Certification (check all that apply):
- RESNET Home Energy Rater
- BPI Building Analyst Professional
- Other

Certification #:

Years of Experience conducting home energy evaluations:

Home Energy Score Certification from Home Energy Score Program? * Yes No

Please list other relevant education and certifications including training in the field of Building Science, selecting suitable energy improvements, or ability to proficiently operate and/or inspect the following; basic A/C, heat pump, water heater, and furnace.

Upload or attach additional documents as necessary to provide information for each proposed *Energy Evaluator.* The last step in the application process will allow you to upload your documents to the reEnergize Program website.

What DOE Approved Energy Evaluator Software do you use? *

How many home energy evaluations (assuming one per field employee, per day) could you perform each week for th
Program starting Winter/Spring 2011? *

What is your current average lead-time between scheduling and performing a home energy evaluation for a homeowner? *

Availability

Please check the boxes next to each timeframe to indicate your willingness/ability to provide energy evaluations during the following timeframes. Your company will be required to complete any contracted work within the designa timeframe. *

- ☐ **Monday-Friday Mornings (9am-12pm)**
- ☐ **Monday-Friday Afternoons (12pm-5pm)**
- ☐ **Monday-Friday Evenings (5pm-8pm)**
- ☐ **Saturday (9am-12pm)**
- ☐ **Saturday (12pm-5pm)**

Equipment

Please indicate whether you own or have access to the following:

Required:

- ☐ **Blower Door**
- ☐ **Carbon Monoxide and/or other noxious gas detector**

Blower Door Software:

Recommended:

- ☐ **Duct Blaster**
- ☐ **Infrared Camera**
- ☐ **Other diagnostic equipment: (please specify)**

DUNS#: *

*** required**

Continue :

reEnergize Program
1819 Farnam Street, Suite 311
Omaha, NE 68183

Contact reEnergize »
Toll Free: (877) 402-5111
info@reEnergizeProgram.org

Join our email list to receive general updates about the program.

Join

File Upload

Please upload any applicable documentation to support your application.

All files must be in PDF or Zip format and cannot exceed 10 MB (10,000 kb) in size.

Energy Evaluator Certification (Certificates): *
Choose File No file chosen

Fist Aid/CPR/OSHA Certification (Certificates):
Choose File No file chosen

Additional Training Certifications (Certificates):
Choose File No file chosen

Safety Program Documents:
Choose File No file chosen

Letters of Recommendation:
Choose File No file chosen

* **required**

Upload »

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ENERGY UPGRADE CONTRACTOR WORKFORCE QUALIFICATIONS AND STANDARDS

In general, the Energy Upgrade Contractors must:

- Comply with EPA and DOE rules and regulations.
- Comply with the National Historic Preservation rules and regulations.
- Perform background checks on all employees and subcontracted employees on the site, assuring no criminal history or drug use background that could indicate a potential threat to residents and/or staff.
- Have access to computer or handheld device with mobile (cellular) internet access that allows inputting data to the database.
- Have general computing skills including, but not limited to internet, Excel, Microsoft Word, Microsoft Outlook. Must have an e-mail address.
- Have an operable cell phone.
- Have a valid driver's license and working vehicle.
- Have a blower door with appropriate software, a CO and noxious gas detector. Access to additional trade-specific tools—such as a duct blaster and infrared camera—are a plus but not a requirement.

The following outlines general standards for workforce qualifications for Energy Upgrade Contractors for the reEnergize Program.

In general:

- Energy Upgrade Contractors will have sufficient skills to conduct energy performance upgrades with a high degree of quality and customer satisfaction.
- In some cases, specific professional certification or training may be required for contractor pre-qualification. At a minimum, Energy Upgrade Contractors will be required to adhere to the performance standards and requirements set by reEnergize as outlined in this document and the *Energy Upgrade Agreement*.
- All Energy Upgrade Contractors must be familiar with and follow the *Waste Reduction and Safety Protocol.*
- All Energy Upgrade Contractors must understand the knowledge, skills, and abilities as set forth in the most recent *Workforce Guidelines for Home Energy Upgrades* as developed by the Department of Energy.

Energy Upgrade Contractor Qualifications and Expectations:

The Energy Upgrade Contractor must employ a Crew Chief who is responsible for supervising the upgrade activities specified in the scope of work. The project Crew Chief is responsible for interacting with the Participant and Energy Evaluator as well as

managing personnel and materials on the job site in such a way as to adhere to work order in a safe and effective manner. The Crew Chief is responsible for quality control, testing procedures, documentation, and conducting a final walk through to ensure that all work is completed in a satisfactory manner. In addition, the Crew Chief must schedule and oversee all subcontractors as required to complete the work order, including but not limited to HVAC installers, wall insulation companies, etc. The Energy Upgrade Contractor may employ various technicians to install energy upgrades and/or improvements to residential units as long as all employed use building science best practices to improve safety, comfort, durability, indoor air quality, and energy efficiency. The Technical Services Implementation Team (TSI) will conduct quality control checks on a percentage of the residential energy upgrades through various means including but not limited to talking with the Participant, visiting energy upgrades in progress, etc.

The most commonly expected measures include insulating and air sealing the building shell, weather stripping doors, caulking windows, lighting updates, installing thermostats and providing carbon monoxide detectors to the participant. Energy Upgrade Contractors are also required to arrange for specialty subcontractors such as plumbers, HVAC technicians and licensed electricians as required. However, the Energy Upgrade Contractor may not contract out the project work to another general contractor.

It is strongly recommended the Energy Upgrade Contractor be Building Performance Institute (BPI) Certified and in good standing. Other trade training courses are available from various Nebraska Community Colleges, Metro Community College, certain trade associations, and the Building Performance Institute http://www.bpi.org/schedules_training.aspx. Energy Upgrade Contractors will be required to have completed energy upgrade specific training through either the community college system and/or relevant trade association.

Additional Energy Upgrade Contractor requirements:

- State required licensing[1].
- No criminal history.
- No drug history.
- Comply with the Living Wage Ordinances of Omaha and Lincoln (minimum rate of $12.00/hour for all workers).
- Comply with all applicable laws and regulations of the Federal Government as well as state and local government jurisdictions.
- Carry general liability insurance in the amount of $1,000,000 or greater.
- Carry automobile liability insurance of $500,000 per accident.
- Carry Nebraska Workers' Compensation Insurance (statutory).
- Provide all goods and facilities necessary to perform the work, including the necessary labor, materials, tools, equipment, utilities, general supervision and transportation.

[1] Licensing, Bonding, Registration – As specified in the bidding and contract documentation: The contractor must be licensed and bonded to do business as general contractors in the State of Nebraska; the contractor must have a current state unified business identifier number and a City of Lincoln or Omaha business license; the contractor must not be disqualified from bidding on any public works contract.

- Serve as general contractor for scheduling and bidding all work as required, such as HVAC, electrical, insulation, etc.
- Guarantee the work performed at each premises against all defects of materials or workmanship for a period beginning with the completion of the contractor's work at the relevant premises and ending 365 days following the completion of the work under the relevant work order. In addition, contractors must provide manufacturer's warranty to homeowners.
- Agree to accept responsibility for the following: (i) cleaning up of rubbish and debris after completion of work and removal and proper disposal of same from the premises, including but not limited to cleaning of walls, floors and other surfaces soiled during the performance of the work; (ii) drywall and/or plaster patching/painting as required adjacent to the work area, and all glass breakage occurring adjacent to or within the work area; and (iii) any damage to property by contractors workers while on site.
- Recycle materials when possible.
- Comply with regular quality control evaluations by the TSI team.

Regulatory Compliance:
The reEnergize Program will require compliance with:

- American Recovery and Reinvestment Act of 2009, http://www.energy.gov/recovery.
- Department of Energy, http://www.doe.gov.
- Energy Efficiency and Conservation Block Grant requirements, www1.eere.energy.gov/wip/guidance.html.
- Federal Acquisition Regulation guidelines, http://www.acquisition.gov/Far.
- Omaha Emerging Small Business (ESB) or Small Business (SB) Program http://www.cityofomaha.org/humanrights/contract-compliance.
- Existing environmental regulations that pertain to the scope of work.

Evaluator: Market Rate Program Deliverables and Details

Evaluator
Contractor
Both

1. Signup and Pre-Evaluation
   1.1. Participant online signup
      1.1.1. The evaluator or contractor may assist a participant in signing up via the reEnergize program website. If the participant selected an evaluator, then the participant's profile in MegaTool is opened to their assigned evaluator
      1.1.2. When someone signs up, an automatic email is generated to notify the reEnergize program navigator who then sends an email to the participant describing next steps. If the participant does not select an evaluator, the next step describes what the participant needs to do in order to select an evaluator
   1.2. Getting utilities
      1.2.1. Utility data: evaluator lets the participant know they must get the past 12 months of utility bills to move forward. The participant can get the bills themselves or they can ask the evaluator or the program navigators to get it for them. Evaluators are responsible for acquiring the utility data (payment for test in is contingent)
      1.2.2. Send all files to utility@reenergizeprogram.org
      1.2.3. Please use this website to access instructions for getting utility data http://reenergizeprogram.org/contractors/getting-utilities
      1.2.4. Evaluators will know if utility info has been provided if it is uploaded to MegaTool
   1.3. Schedule: participant and evaluator schedule the evaluation
   1.4. Agreement: evaluator and participant sign the evaluator agreement
      1.4.1. Evaluator scans and uploads the signed evaluator agreement to MegaTool
      1.4.2. By uploading this document to MegaTool, evaluator will be granted full access to upload evaluation results and other materials
   1.5. Payment: the evaluator sets the price for the market rate program (minus the $100 incentive and test out fee). Evaluator then accepts payment from the participant
2. Test in evaluation
   2.1. Evaluator conducts reEnergize market rate evaluation, according to scope (Recommended practice: Check for vermiculite in the attic first!)
      2.1.1. Evaluator comes to the house at the scheduled time for a 2-4 hour evaluation. The first step usually being a pre-evaluation interview if it hasn't already been conducted
      2.1.2. Evaluator completes the preliminary workbook and evaluation report and sends it to participant for their initial review. Evaluator will need to use the MegaTool's evaluator checklist to estimate costs for upgrades
      2.1.3. Face-to-face meeting or phone conversation takes place to answer participant questions about the results and to confirm which upgrades they would like to receive bid prices on

2.1.4. Be sure to include pertinent comments from the participant into the workbook, such as "client wants to use Acme HVAC as a subcontractor, please contact John Doe at 4025555555"

2.2. Evaluator uploads the following to MegaTool:

2.2.1. The finalized pre-bid workbook,

2.2.1.1. The contractor is putting their bid together based on this document, it is crucial this be ready for bid

2.2.1.2. If you uploaded a previous workbook and need to replace it, upload the newest version and the old will be deleted

2.2.2. The evaluation report, (Opti-mizer, NEAT, etc…)

2.2.3. The "test-in" document,

2.2.4. Pictures from the evaluation

2.3. Evaluator finalizes the evaluation by clicking "Complete Evaluation Process" in MegaTool (payment to the evaluator is contingent on this action)

2.3.1. An automatic email is sent to the evaluator and the participant with a website link to a web page where, after logging in (using a provided id# and passcode), the evaluator or the participant can select who gets a chance to bid on the project

2.3.2. Once the intake form is completed an auto email is sent to the contractor letting them know they now have access to the participant's page and can enter their bids into the workbook and return it to them within ten days

2.4. This concludes the test in section for the evaluator. When all the materials have been uploaded, invoice for $100 shall be generated and paid thorough the program

3. Contractor Bidding and Upgrade Implementation

3.1. After the contractor receives notice that they have access to submit bids on a participants work, they will need to:

3.1.1. Access Megatool referencing the building number and participant name sent in the email.

3.1.2. Download the project workbook, the pictures, the evaluation software report (ie optimiser or NEAT) and any other relevant documents that the evaluator has uploaded.

3.1.3. Review the provided documents to determine your project estimates

3.1.3.1. If something in the work scope is unclear, be sure to schedule a time to meet with the participant at the house to get a better look or feel free to call the evaluator (reference the workbook for contact information)

3.1.4. Once you feel comfortable with your bids enter them into the workbook under "contracting worksheet"

3.1.4.1. If you need to do an alternate bid, there are three columns for bids

3.1.4.2. Save the workbook with your company name in the file name and upload it to Megatool

3.2. Send an email to the participant with the workbook as an attachment. If the participant does not have an email address listed, print the workbook and mail it. Include in the email or letter that they can view the bids in the "contracting worksheet" and "exhibit a" worksheets.

3.3. Participant selects contractor: When a participant selects a contractor the next step is to get a signed upgrade contractor agreement

3.3.1. Once the upgrade contractor agreement is signed the contractor will upload it to megatool and full access to that participant is assigned to the contractor

3.4. Evaluator is contacted by the contractor to come and perform the checkout on the last day of work

4. Test out

4.1. "At conclusion of work, evaluator meets with contractor and participant to conduct the test out

4.2. If the project passes, the triple sign out form is signed by evaluator, contractor, and participant. If an issue is found, evaluator should contact TSI immediately. Contractor will upload the triple sign out sheet Once the triple sign out is signed and uploaded, the contractor will invoice the reEnergize Program utilizing the online invoice feature in MegaTool. Invoices received by Noon on Thursday will be processed for payment in two weeks.

4.3. When Test Out sheet is complete, Evaluator scans and uploadeds to MegaTool

4.4. After the Test Out is uploaded the Evaluator will be issued $150 by the program

reEnergize Low and Moderate Program Deliverables and Details

Evaluator

Contractor

Both

1. Signup and Pre-Evaluation
    1.1. Participant Online Signup
        1.1.1. The evaluator or contractor may assist a participant in signing up via the reEnergize Program website. If the participant selected an evaluator, then the participant's profile in MegaTool is opened to their assigned evaluator
        1.1.2. When someone signs up, an automatic email is generated to notify the reEnergize program navigator who then sends an email to the participant describing next steps. If the participant does not select an evaluator at signup, the next steps describe what the participant needs to do in order to select an evaluator
        1.1.3. If the evaluator is signing a participant up, they should assign a contractor if the participant does not have one in mind
    1.2. Getting Utilities
        1.2.1. Utility Data: evaluator lets the participant know they must get the past 12 months of utility bills to move forward. The participant can get the bills themselves or they can ask the evaluator or the program navigators to get it for them. Evaluators are responsible for acquiring the utility data (payment for test in is contingent)
        1.2.2. Send all utility files to utility@reEnergizeProgram.org
        1.2.3. Please use this website to access instructions for getting utility data http://reenergizeprogram.org/contractors/getting-utilities
        1.2.4. Evaluators will know if utility info has been provided if it is uploaded to MegaTool
    1.3. Schedule: participant and evaluator schedule the evaluation. Evaluator will want to consider the schedule of the contractor that was selected as they will meet the evaluator at the job to review work scope
        1.3.1. Evaluator assigns the contractor of their (or the participant's choice) in Megatool and asks the contractor to be present at the evaluation
    1.4. Agreement: evaluator and participant sign the Low and Moderate Evaluator agreement. Please access the document downloads page for the most updated agreement. http://contractor.reenergizeprogram.org/document_downloads.php
        1.4.1. Evaluator scans and uploads the signed evaluator agreement to MegaTool
        1.4.2. By uploading this document to MegaTool, evaluator will be granted full access to upload evaluation results and other materials
    1.5. Payment: evaluator accepts $100 payment from participant upon signing agreement. In the case that funds are donated on behalf of the participant, evaluator will call Program to confirm dedicated funds
2. Test-in evaluation and work scoping
    2.1. Evaluator conducts the low to moderate income reEnergize Evaluation, according to scope (Recommended practice: Check for vermiculite in the attic first!)
    2.2. Evaluator completes the LM workbook at the house
    2.3. The evaluator sends the workbook to the contractor for him to complete bidding
    2.4. Evaluator uploads the following to MegaTool:

2.4.1. The finalized pre-bid workbook,

2.4.1.1. The contractor is putting their bid together based on this document, it is crucial this be ready for bid

2.4.1.2. If you uploaded a previous workbook and need to replace it, upload the newest version and the old will be deleted

2.4.2. Test in document,

2.4.3. Pictures from the evaluation

2.5. Evaluator hands over the workbook to the contractor using a thumb drive or email

2.6. This concludes the test in section for the evaluator. When all the materials (eligibility verification, agreement, utilities (confirmed), workbook with contractor bids, test In Sheet, and pictures) have been uploaded, an invoice for $200 shall be generated and paid through the program.

3. Contractor bidding and upgrade implementation

3.1. The contractor will spend time (preferably at the appointment) entering their bids into the workbook. If bid prices go over the estimated prices the contractors must get approval from reEnergize staff to proceed

3.2. If no program approval is needed for certain bids, the contractor and participant are free to schedule the work

3.3. The contractor asks the participant to sign the low and moderate income upgrade contractor agreement, see here to access the most recent version: http://contractor.reenergizeprogram.org/document_downloads.php. The contractor will then upload the agreement (pdf) to megatool with exhibit a (pdf) and the winning workbook (excel workbook). Full access to this participant in megatool is now available to the contractor

3.4. Contractor accomplishes the work

3.5. Evaluator is contacted by the contractor to come and perform the test out on the last day of work

4. Test out

4.1. At conclusion of work, Evaluator meets with Contractor and Participant to conduct the test out

4.2. If the project passes, the triple sign out is signed by evaluator, contractor, and participant. See the Document Downloads page for the most recent version: http://contractor.reenergizeprogram.org/document_downloads.php. If an issue with the quality of work, the materials, or the performance of the upgrades is found, the evaluator should contact TSI immediately.

4.3. Contractor will upload the triple signout sheet. Once the triple sign out is signed and uploaded, the contractor will invoice the reEnergize Program utilizing the online invoice feature in MegaTool. Invoices received by Noon on Thursday will be processed for payment in two weeks.

4.4. When test out sheet is complete, evaluator scans and uploadeds to MegaTool.

4.5. After the test out is uploaded the evaluator will be issued $150 by the program

ONE SHEET: PARTICIPANT PROCESS

Legend: Costs Incentives

1. **SIGN UP** at www.reEnergizeProgram.org or call 877-402-5111 and a navigator will assist you
   1.1. While signing up participant selects an evaluator and which program path they would like to move forward with
      - 20 minutes
2. **ENERGY EVALUATION** - Evaluator and participant set up an appointment to do a test-in evaluation
      - 1-14 days depending on schedules and workload
   2.1. **Market Rate Path** - Evaluator provides results
      - Usually $300-400 depending on the evaluator. This cost is credited back to the participant when they move forward with upgrades
      - 1-14 days depending on evaluator schedule
   2.2. **Low and Moderate Path**– Evaluator schedules work with contractors and they develop scope of work together
      - Always $100 for the entire L/M path paid to the evaluator
      - 1-10 days depending on evaluator schedule
3. **ENERGY UPGRADES** – Upgrades are installed by qualified energy contractors who may employ qualified subcontractors, but will manage and schedule the job. Participant is asked to pay the contractor their full portion up front (program pays theirs at project completion), but this may be negotiable with the contractor.
   3.1. **Market Rate Path** – participant receives $100 per percentage of annual energy savings for up to half the cost of the overall upgrade package. Annual percentage savings is calculated at the energy evaluation
   3.2. **Low and Moderate Path** – participant receives up to $3,000 in upgrades that were prescribed by the evaluation, there is no flexibility in upgrade choices in the L/M path
4. **CHECK OUT** – The same energy evaluator that performed the test-in evaluation comes back to do the test-out and the participant, evaluator, and contractor sign off on the project to finalize it. The contractor is then paid the rest of the amount for the project incentive by the program.

Detailed Description of Participant Process

LEGEND: Market Rate Low to Moderate Income Both

0. QUALIFICATION

0.1. Both paths

0.1.1. Must live within the city limits of Omaha or Lincoln. This is filtered after the participant enters their address online at the first step of signup with a tool developed in cooperation with the Douglas County GIS Department. The tool also includes Lincoln data

0.1.2. Participants cannot be a City of Omaha employee, an employee of an agency or business in contract with the reEnergize Program directly, an upgrade contractor with reEnergize, or an evaluator with reEnergize (http://reenergizeprogram.org/residents/contractor/)

0.2. Low and Moderate Income – Additional Income Qualification

0.2.1. Participant must be below 2012 United States Housing and Urban Development Area Median Income. Participant must include proof of income to the evaluator or directly to the program. Reference table and possible qualifying documents here http://reenergizeprogram.org/lm-income/. Documents must prove the total gross income is lower than the Area Median Income for Omaha and Lincoln or must prove that they qualify for a program with this income level as a restriction

0.2.2. Qualifying Participant (person providing proof of income) must be the utility payer for the property application

0.2.3. Participant and contact information must be the homeowner, so they are involved in decision making and approval at all times

1. SIGNUP

1.1. Participant online signup at www.reEnergizeProgram.org

1.1.1. If participant does not have online access, they can call 877-402-5111

1.1.2. Participant should have their MUD and OPPD account numbers available for signup.

1.1.3. Participant selects the program path they would like to move forward with. This can be changed by a program administrator before the evaluation takes place. See step 4.1.1-4.1.2 "Test in Evaluation" for further details on the importance of choosing the correct path

1.1.4. Participant selects the evaluator they would like to move forward with: http://reenergizeprogram.org/residents/evaluator-page/

1.1.5. Participant can also select their contractor

1.1.6. When the participant signs up, an automatic email is generated to notify the reEnergize program navigator who then sends an email to the participant describing next steps within 24 working hours

1.1.7. If the participant does not select an evaluator, the next step describes what the participant needs to do in order to select an evaluator

1.1.8. If the participant does select an evaluator, an automatic email is sent to the evaluator notifying them they should contact the participant to schedule an appointment within 72 hours

1.1.9. The landing message after the signup process and the email from the navigator to the participant mentions the requirement of acquiring the past 12 months of utility data

1.2. Getting utilities

1.2.1. Utility data: the evaluator lets the participant know they must get the past 12 months of utility bills to move forward. The participant can get the bills themselves via phone or online or they can ask the evaluator or the program navigators to get it for them Evaluators are responsible for acquiring the utility data (payment for test in is contingent)

1.2.2. Please use this website to access instructions for getting utility data http://reenergizeprogram.org/contractors/getting-utilities

1.2.3. Send all files to utility@reenergizeprogram.org

1.2.4. Evaluators will know if utility info has been provided if it is uploaded to our database

2. EVALUATION

2.1. Scheduling: participant and evaluator schedule the evaluation; within one week if possible

2.2. Evaluator Agreement: evaluator and participant sign the evaluator agreement

2.2.1. Evaluator scans and uploads the signed evaluator agreement to our database

- By uploading this document to our database, evaluator unlocks full access to upload evaluation results and other materials in the our database

2.3. Payment

2.3.1. Market Rate Evaluator Payment: the evaluator sets the price for the market rate program (minus the $100 incentive and test out fee). Evaluator then accepts payment from the participant

2.3.2. Low and Moderate Income Payment: Homeowner, tenant, or an outside sponsor can provide the $100 commitment to the evaluator.

- Participant provides proof of income to the evaluator see section 1.2 above

2.4. Test-in Evaluation - Evaluator conducts reEnergize evaluation, according to scope

2.4.1. Market Rate test-in is considered a full scope reEnergize evaluation

2.4.2. Low to Moderate Income test-in is considered an abbreviated evaluation and is somewhere around 60% of the full scope reEnergize evaluation (thus the reduced price)

- Low to Moderate projects are meant to move faster and give participants the quickest and most cost-effective upgrades

2.5. Evaluator comes to the house at the scheduled time to conduct the specified evaluation. The first step usually being a pre-evaluation interview if it hasn't already been conducted via the phone

2.5.1. Market Rate - Evaluator completes the preliminary workbook and evaluation report and sends it to participant for their initial review. Evaluator will need to use the our database's evaluator checklist to estimate costs for upgrades

- Face-to-face meeting or phone conversation takes place with evaluator to answer participant questions about the results and to confirm which upgrades they would like to receive bid prices on
- Evaluator is sure to include pertinent comments from the participant into the workbook, such as "client wants to use Acme HVAC as a subcontractor, please contact John Doe at 4025555555"
- After evaluator uploads key documents they finalize the evaluation by clicking "Complete Evaluation Process" in our database (payment to the evaluator is contingent on this action)
- The result of clicking this button is an automatic email sent to the evaluator and participant with instructions for submitting the project for bidding amongst contractors. It is the evaluator's responsibility to make sure this gets done

2.5.2. Low to Moderate – Evaluator completes the low to moderate workbook usually at the house discusses the results with the contractor who has been invited to the evaluation appointment. Evaluator also discusses the work scope with the participant.

- Contractor reviews the scope with the evaluator confirms the work scope and enters the pricing into the workbook. If no pricing adjustments are needed the contractor can schedule the work with the homeowner possibly that day, but more likely within a week or two.
- If pricing adjustments are needed the contractor will submit the workbook to program administration by uploading it to our database and clicking "approval needed." Program should review and finalize within 5 days. The contractor is then free to schedule work with the participant.

3. ENERGY UPGRADES

3.1. Market Rate - the bidding process is meant to create competition and keep pricing "honest" between contractors

- Once the evaluator or participant completes the release for bid process the contractor receives an email notifying them this property is available for them to provide a bid on the project

4.1.1. Forming bids - The contractor can then access our database to view documents from the evaluation such as: the evaluation report, pictures from the evaluation, and the project workbook which is the main document they will be working with.

- The contractor can contact the participant to set up a time to visit the house for work scope background
- The contractor can also call the evaluator for more information

4.1.2. Submitting bids - Once the contractor feels comfortable with their bids they will enter them into the workbook under "contracting worksheet"

- There are three columns for alternate bids
- Once done the contractor will upload to the database and email it to the participant. If email is not available for the participant they will need to call and send a print version in the mail

4.1.3. Participant selects contractor - When a participant selects a contractor the next step is to get a signed upgrade contractor agreement

- Once the upgrade contractor agreement is signed the contractor will upload it to our database and full access to that participant is unlocked to the contractor

4.1.4. Schedule and complete the upgrades – Depending on scope and scheduling the contractors can usually finish within 1-7 days

4.2. Low to Moderate – Once scheduled the work can usually be done within 1-7 days

4.3. Scheduling the test-out – The Evaluator is contacted by the contractor to come and perform the checkout on the last day of work

4.4. Test out - at conclusion of work, the evaluator meets with contractor and participant to conduct the test out. The test-out or "check-out" brings the original evaluator back to make sure the correct scope, the correct materials are installed to the correct standard of workmanship set by the program. They also redo the blower-door-test to ensure the upgrades are performing to their estimated potential

4.4.1. Passed - the triple sign out form is signed by evaluator, contractor, and participant.

- Once the triple sign out is signed and uploaded, the contractor will invoice the reEnergize Program and then receive payment for the remainder of the project

4.4.2. Failed - If an issue is found, the evaluator should contact Technical Services Implementation (TSI) team immediately

- The issue will be identified and remedied before the triple sign out
  - The TSI team has the ultimate say in whether a project is satisfactory and can override the triple-sign-out signature if needed. The TSI team must always have qualified and experienced staff to make those decisions

reEnergize LED Lighting Upgrade Incentive

The reEnergize Program is funded by a grant from the Department of Energy to help build the market for residential and commercial energy evaluations and upgrades and is administered by the cities of Omaha and Lincoln. To help expand the market for upgrading existing commercial and nonprofit organizations lighting, the reEnergize Program is providing additional incentive in coordination with the OPPD Lighting Incentive Program.

Qualifications

Commercial lighting contractors who are listed with OPPD as a Lighting Trade Ally are eligible to apply for reEnergize incentive funds. In accordance with the OPPD pre-approval form, the reEnergize incentive will be provided directly to the Lighting Trade Ally.

Incentive Guidelines

- Rate payer must be with the Omaha city limits
- Additional funding equal to the OPPD incentive for pre-approved projects
- Lighting upgrades must be to a qualified LED product listed on the current OPPD "Lighting Configuration References Sheet"
- $2,000 maximum for reEnergize incentive funds
- reEnergize funding will be capped so that when combined with the OPPD incentive, the combined incentive will **NOT** exceed the material cost of the upgrades

reEnergize Incentive Process

- Follow all of the normal OPPD Lighting Incentive guidelines
- After pre-approval using the "Lighting Incentive Application" spreadsheet, either the building owner or the Lighting Trade Ally will fill out the reEnergize online form,
  Commercial / Nonprofit Lighting Participant Intake
  http://contractor.reenergizeprogram.org/commercial_lighting_intake.php
- When the Lighting Trade Ally submits documentation of the project including:
  - OPPD Lighting Incentive Application
  - Invoice showing the commercial/nonprofit participants contribution

  the invoice will be filed by the reEnergize Technical Services Implementation (TSI) team on the next Friday, and the check will be written and mailed form the City of Omaha to the Lighting Trade Ally the following Thursday.

THIS DOCUMENT AND INCENTIVE PROGRAM IS UNDER DEVELOPMENT AND IS SUBJECT TO CHANGE AT ANY TIME.

Contact:
Eric Williams 402-444-4302 Eric.Williams@ci.omaha.ne.us

For a list of approved RTU Incentive Trade Allies, go to oppd.com/RTU. Trade Allies provide no-cost, no-obligation RTU audits and proposals. They will also complete the program application and answer your questions about the OPPD RTU Incentive Program.

reEnergize

ENERGY STAR PARTNER

Receive incentives and reduce your heating and cooling costs.

oppd.com/RTU

RTU Incentive Program

your energy partner®

OPPD Omaha Public Power District

0912OPPD

your energy partner®

Roof-Top Unit (RTU) Incentive Program

OPPD offers incentives to commercial and industrial customers to make their RTU more energy-efficient.

Roof-top units (RTUs) are used for heating, cooling and venitilation. Recently, upgrades have been developed to make RTUs 28 to 68 percent more energy-efficient, while maintaining occupant comfort.

OPPD now offers incentives for upgrades added to existing RTUs by a qualified Trade Ally.

RTUs are often larger than they need to be, resulting in wasted energy. RTU upgrades will result in your RTU operating more efficiently, saving you energy and money.

The Process

» Visit oppd.com/RTU to view a list of Trade Allies.

» Work with the Trade Ally to determine your needs.

» Complete the preapproval process with your Trade Ally. The Trade Ally will submit the following:

- RTU Incentive Program application
- W-9 form for Trade Ally
- RTU Pricing Savings Estimator and Invoice Worksheet

» The Trade Ally will install the device(s). Installations must be completed within 90 days of preapproval.

» Submit an itemized invoice to OPPD within 30 days of project completion.

Receive your incentive check!

** You must work with a Trade Ally to receive the incentive. Terms & Conditions at oppd.com/RTU.*

reEnergize
building energy smart communities

reEnergize Program Incentives

For a limited time, commercial and industrial buildings that are 20,000-square-feet or less may also qualify for additional incentives from the reEnergize Omaha Program. Incentives include:

» Energy-efficienct screw-in replacement LED light bulbs for your facility

» Incentives, in addition to OPPD's RTU incentives, to pay down the cost of Digi RTU Optimizer upgrades to a projected one-year simple payback.

» Up to 30 hours of consultation from a Sustainability Advisor

This is a limited-time offer. To learn more about these incentives, visit **reenergizeprogram.org/commercial** or call toll-free 877-402-5111.

** Incentives associated with the reEnergize Program must be preapproved by OPPD prior to any work being completed in order to ensure incentive funding.*

reEnergize
building energy smart communities

Marketing and Engagement Strategy

reEnergize Program Overview

January 2011

Main Table of Contents

Preface

As part of the U.S. Department of Energy BetterBuildings Grant Program, the reEnergize Program is designed to be a model program for transforming an energy efficiency evaluation and upgrade market in any region across the United States. With this goal in mind, the reEnergize Program will increase the size and skill of the related workforce, raise citizen awareness, improve comfort in homes and commercial buildings, and develop sustainable financing opportunities for residents of all income levels. This document was created to allow and foster replicability.

The following Marketing and Engagement Strategy is a living, dynamic document. As the reEnergize Program progresses through five implementation stages, best practices and lessons learned will be documented to inform each consecutive stage. The constant evolution of these reEnergize Program strategies will create an ever-improving approach to engagement with local communities and individuals. The transparency that this document will allow positions it as an educational tool for cities and marketing professionals looking to expand an energy-efficiency upgrade market.

The reEnergize Program approach relies heavily on technological solutions for community dialogue and data management. Relevant sections of this document describe usage and applications for these tools. At every stage, decision-making processes and rationales for actions are described to assist the reEnergize Team in the continuous improvement of program tools and strategies while developing a model for other communities to follow.

Overall Program Marketing and Engagement Strategy

Marketing and Engagement Program Strategy

Overview

In April 2010, Vice President Joe Biden announced twenty-five recipients of a United States Department of Energy (DOE) administered competitive funding opportunity, originally called the Retrofit Ramp-up and subsequently renamed the BetterBuildings Program. The City of Omaha, in partnership with the City of Lincoln, was one of the named recipients. In May 2010, the U.S. DOE formally awarded a $10 million Energy Efficiency and Conservation Block Grant to the City of Omaha for an effort intended to transform the energy upgrade market in the Greater Omaha and Greater Lincoln areas. This program, known as the reEnergize Program, will initiate the process of market transformation by:

- Providing simple and accurate information about energy efficiency and upgrading residential and commercial buildings throughout the Omaha and Lincoln communities;
- Identifying financing opportunities that enable home owners to complete energy efficient upgrades; and
- Supporting job training and entrepreneurship programs to ensure that businesses are able to respond to energy efficiency and upgrade market demands.

reEnergize provides a unique opportunity to catalyze energy markets in a way that has never been done before. The work completed here can become a model for other cities to follow—the reEnergize Program and the Omaha-Lincoln partnership can be one of few to lead the nation in setting the standard for sustainable energy management and marketplace development.

Program Implementation

The reEnergize Program will focus on building energy smart communities in which residents are encouraged and empowered to save money and energy as well as improve comfort in their homes and commercial buildings. Through the grant, along with support from local partners, the reEnergize Program will provide incentives and financing opportunities for residents to perform energy-saving building improvements.

The reEnergize Program will work with community organizations to provide access to information, financing assistance, and a qualified workforce that can offer energy-saving services. By matching this workforce with interested local building owners and tenants, the reEnergize Program will help drive down the cost of energy improvements by increasing the demand to reinvest in our communities.

Staging

The reEnergize Program is divided into five stages, beginning January 2011 and ending May 2013. Each stage will last approximately six months.

By distributing project delivery over time and into stages, the reEnergize Program instills a

continuous improvement process in which refinements can be made to programmatic tools and best practices can be identified and disseminated.

The five stages include:

- Stage 1: January 2011 – June 2011
- Stage 2: July 2011 – December 2011
- Stage 3: January 2012 – June 2012
- Stage 4: July 2012 – December 2012
- Stage 5: January 2013 – May 2013

Each stage will reflect an increasing level of complexity, based on building and ownership type. In addition, each project stage will include an evaluation period and improvement recommendations for the next stage. This will allow for the initial development of core programmatic tools as well as continued refinement of those tools to address the needs of different building types and participants. The evaluation period will allow time for major decisions to be made about project delivery and program management approaches and for those changes to be implemented.

Stage-specific chapters in this document will discuss in depth the tools and strategies used. The expected outcomes and timetable will be used as a baseline to report progress made in the reEnergize Program.

Upgrade Goals

The reEnergize Program will strive to produce 3,193 residential energy upgrades and 263 commercial and nonprofit energy evaluations by May 2013. The specific estimations are based on a calculation of reEnergize Program funds available for incentives and projected average property upgrade costs for specific geographical areas. Based on the proportional size of each community's population, approximately 2/3 of the total projects will be completed in Omaha and 1/3 will be completed in Lincoln.

In order to establish periodic benchmarks, participant completion targets have been established for each stage as summarized in Table 1.

Table 1: reEnergize Program Upgrade Goals by Stage

	Stage 1 (Pilot)	Stage 2	Stage 3	Stage 4	Stage 5	Total
Residential	323 (80)	610	830	830	600	3,193
Commercial and Nonprofit	26 (0)	52	75	75	35	263

Start Zones

Geographically defined areas in both Omaha and Lincoln have been identified as districts to initiate the reEnergize Program. These areas, referenced as Start Zones, were selected to

incorporate neighborhood-scale redevelopment and capitalize on existing neighborhood communication mechanisms, including neighbor-to-neighbor messaging, and participant promotion.

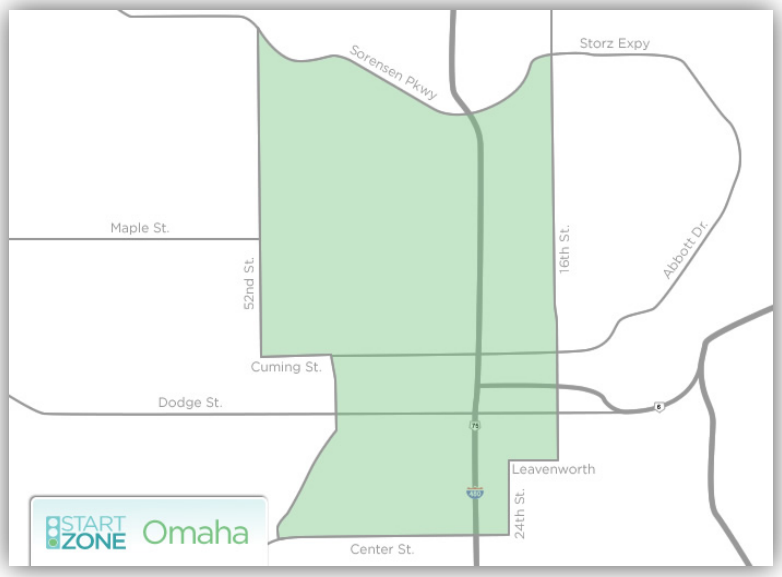
In both Omaha and Lincoln, the Start Zones have been selected based on 1950s city limits and on developed areas with a large percentage of 1940s and older building stock. Other factors included a mix of residential and commercial buildings, concentration of active neighborhood associations and consistency with each City's individual redevelopment areas.

The Omaha Start Zone for the Pilot of Stage 1 is bound from Lake Street to Leavenworth Street and 16th Street to 36th Street. During the two month Pilot, specific targeting of single-family homeowners occurred.

Figure 1: Omaha Pilot Start Zone

Following the Pilot, the Stage 1 Start Zone boundaries will expand to include the development project boundaries of Destination Midtown (www.destinationmidtown.org) and the North Omaha Development Project (www.omahachamber.org/nodp/). During Stage 1, all of the Omaha Start Zone will be targeted through marketing and outreach.

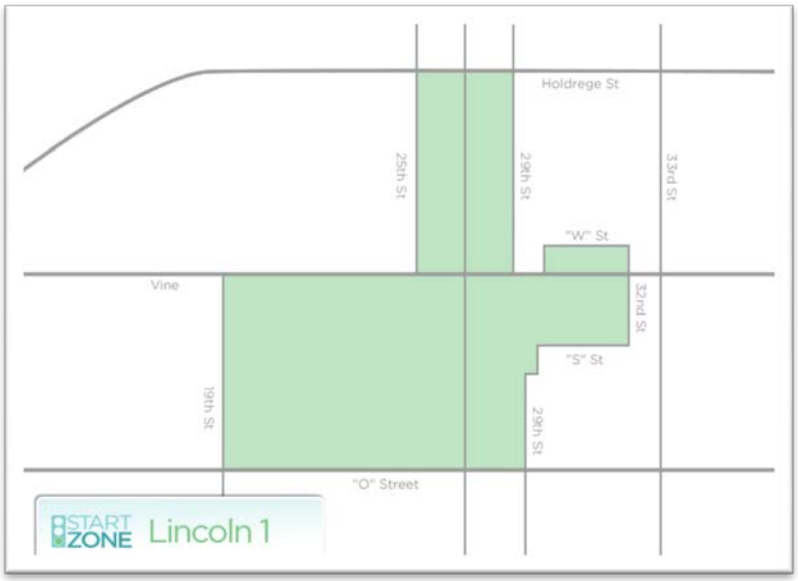
Figure 2: Omaha Stage 1 Start Zone

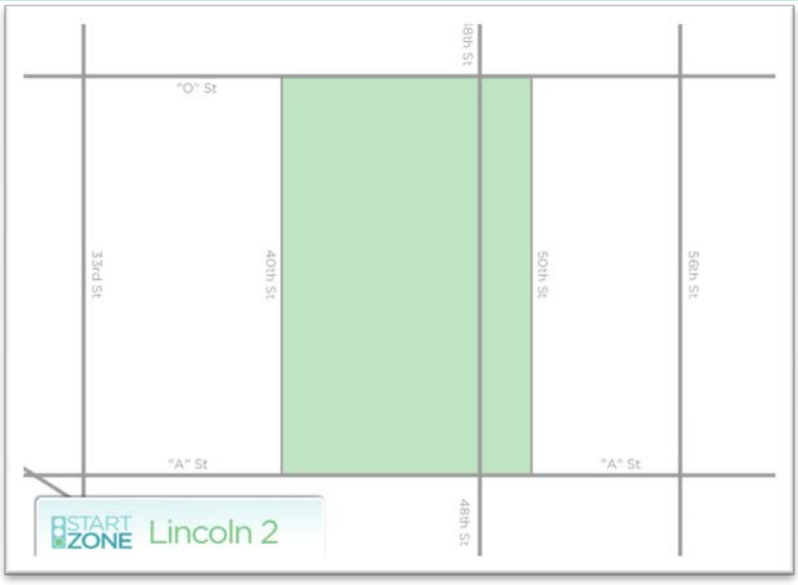


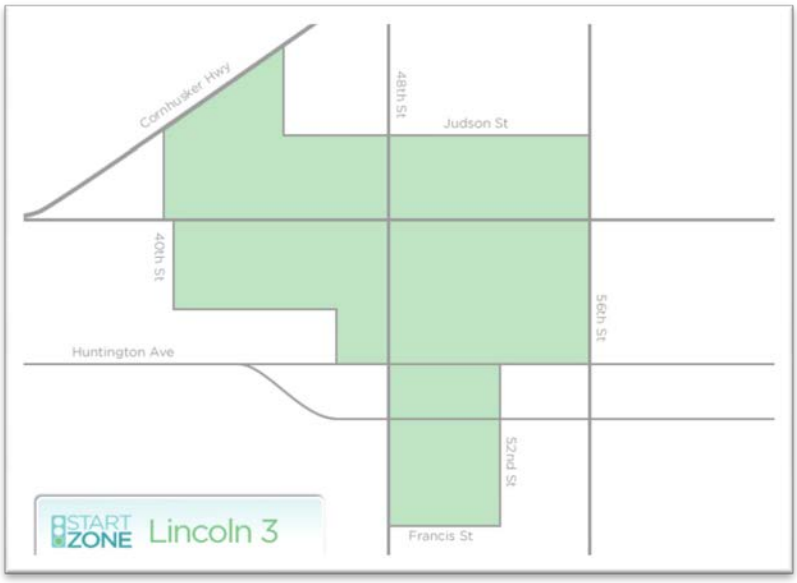
The boundaries for the Start Zones may expand with future stages of the reEnergize Program. As this happens, marketing strategies will be realigned to include all additional target markets. Lincoln Start Zones include four approximate geographic areas:

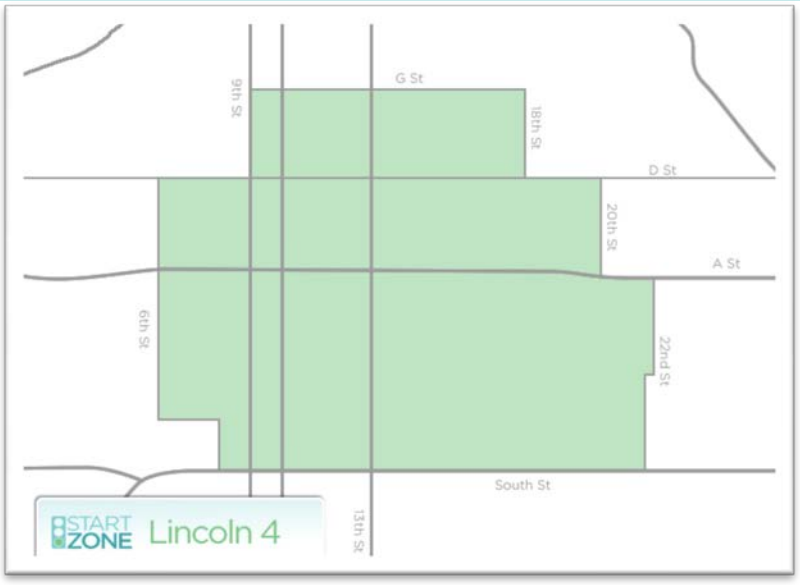
- Start Zone 1: Holdrege Street to O Street, 32nd Street to 19th Street
- Start Zone 2: O Street to A Street, 50th Street to 40th Street
- Start Zone 3: Cornhusker Highway to Francis Street, 56th Street to 40th Street
- Start Zone 4: G Street to South Street, 22nd Street to 6th Street

Figure 3: Lincoln Start Zones




18th St
"O" St
33rd St
40th St
50th St
56th St
"A" St
"A" St
48th St
START ZONE Lincoln 2


Cornhusker Hwy
48th St
Judson St
40th St
56th St
Huntington Ave
52nd St
Francis St
START ZONE Lincoln 3



Target Market Analysis and Outreach Strategies

Three categories of target markets have been identified through area research and qualitative and quantitative data analysis. These markets include consumer markets, contracting markets and Stakeholders. Consumer target markets include potential participants in the reEnergize Program; contracting target markets are those who can become qualified contractors to implement reEnergize Program work and help spread the word through labor and employment networks; and stakeholder target markets include individuals or organizations that have influence in the Start Zones. In total, seventeen target markets have been identified for the full reEnergize Program. These target markets and their roles in reEnergize are shown in Table 2.

Table 2: Target Market Classification and reEnergize Program Roles

Target Market	Subcategory	reEnergize Program Role
Consumer Market		
	Residential: Owner-Occupied - Single	Prospective participant, Message carrier
	Residential: Owner-Occupied - Multiple	Prospective participant, Message carrier
	Commercial and Nonprofit: Owner-Occupied	Prospective participant, Message carrier
	Property Owners/Managers	Prospective participant, Message carrier
	All Omaha and Lincoln Communities	Prospective participant, Message carrier
Contracting Market		
	Energy Evaluators – Residential	Prospective contractors, Message carrier
	Energy Upgrade Contractors – Residential	Prospective contractors, Message carrier
Contracting Market		
	Energy Evaluators – Non-residential	Prospective contractors, Message carrier
	Energy Advisors – Non-residential	Prospective contractors, Message carrier
	Labor Organizations	Message carrier
Stakeholders		
	Leverage Partners	Message carrier, Program advisor
	Grassroots Organizations	Message carrier
	Community Influencers	Message carrier, Community recruiter
	Elected Officials and Nonprofits	Message carrier
	Enrolled Participants	Message carrier, Program advisor
	Residential: Tenant Occupied - Single	Message carrier
	Residential: Tenant Occupied - Multiple	Message carrier
	Commercial and Nonprofit: Tenant Occupied	Message carrier

Consumer Market

Property ownership groups within the Start Zones are the consumer target market for the reEnergize Program. Table 3 indicates categorical breakdowns and descriptions of all residential properties and all commercial and nonprofit buildings in Omaha and Lincoln Start Zones. Owner-occupied properties are outlined explicitly; tenant-occupied buildings are included under “Property Owner/Manager” because, ultimately, enrollment decisions must be made by the property owners and managers.

Table 3: Consumer Targets

Target	Description
Omaha	
Residential: Owner-Occupied - Single	Stand alone dwelling (i.e., house)
Residential: Owner-Occupied - Multiple	Multiple unit dwelling (i.e., duplex)
Commercial and Nonprofit: Owner-Occupied	Storefront or office building
Property Owner/Manager	Apartment or Condominium
Lincoln	
Residential: Owner-Occupied - Single	Stand alone dwelling (i.e., house)
Residential: Owner-Occupied - Multiple	Multiple unit dwelling (i.e., duplex)
Commercial and Nonprofit: Owner-Occupied	Storefront or office building
Property Owner/Manager	Apartment or Condominium

Consumer targets markets were identified by analyzing the City of Omaha/Douglas County and the City of Lincoln Assessors data. By evaluating the owner mailing address and owner building address, further segmentation of potential consumer target markets were identified.

The data fields that were requested to assist in market analysis of consumer targets markets include the following:

- Owner Address
- Property Address
- Occupancy (Owner or Tenant)
- Type (Residential, Multi-Residential or Commercial)

Contracting Market

Contracting target markets include Energy Evaluators and Energy Upgrade Contractors who are currently qualified or can become qualified to implement reEnergize Program work and help spread the word through labor and employment networks. Marketing to contractors and getting them initiated to the reEnergize Program will be fundamental to the successful uptake of quality energy evaluations and upgrades in the Omaha and Lincoln markets. The reEnergize Program will engage Energy Evaluators and Energy Upgrade Contractors through a variety of mechanisms, such as presentations to industry groups, development of a listserv for notifications, and coordination with local green training programs. Coordination with Leverage Partners, specifically Metropolitan Community College, the Greater Omaha Chamber Workforce Solutions, University of Nebraska at Lincoln, and the Nebraska Department of Labor will also be used to help enhance outreach to potential contractors.

Contractors will be challenged to gain or improve their skill sets and certifications in order to qualify to bid on reEnergize Program project work. The program has partnered with the Nebraska Workforce Development Agency to develop and fund training opportunities for unemployed or incumbent workers in the green building industry. The work quality

requirements established by the reEnergize Program are closely aligned with the U.S. DOE's forthcoming Workforce Guidelines for Home Energy Upgrades. Community organizations, such as Metropolitan Community College, will offer courses in basic weatherization installer techniques that demonstrate compliance with the U.S. DOE's guidelines regarding knowledge, skills, and abilities.

Stakeholders

Stakeholder target markets involve the early adopters of energy conservation behaviors, existing community networks, interested citizens and enrolled participants. These stakeholder target markets are utilized to increase reEnergize Program credibility and help to further educate and engage the consumer and contracting markets. These groups include Leverage Partners, Community Influencers, Grassroots Organizations, Enrolled Participants, Elected Officials and Nonprofits, and Tenants.

Leverage Partners

In total, more than $50 million has been pledged to support the reEnergize Program's effort to catalyze an energy upgrade market by a growing number of area businesses and nonprofits, including utilities, institutions of higher education, community organizations, and State of Nebraska departments. These supportive entities, known as Leverage Partners (LP), have made specific pledges in one or more of the following key market areas:

- Technical support,
- Workforce development,
- Small business support,
- Financial mechanisms,
- Consumer information,
- Neighborhood advocacy, and
- Overall market strategy.

Through the time and talent represented by these pledges, Leverage Partners provide their knowledge of the markets, their business experience, and provide buy-in and ownership to the reEnergize Program.

Based on their key market area contributions, Leverage Partners will opt to participate in one of the following workgroups:

- Marketing and Engagement – focused on the engagement and navigation of participants, consumer information, market strategy, and neighborhood advocacy;
- Technical Implementation – focused on workforce development, small business support, and technical delivery; and
- Program Administration – focused on existing and future program design, including replication, sustainability after grant funds expire, and financial mechanisms.

These workgroups focus on necessary reEnergize Program action areas and allow for streamlined and optimized dialog on pledge-related topics. Overall, these groups create an environment for efficient task management and coordination within each workgroup and among all LPs.

This workgroup structure will also be used as an outline for MindMixer topic categories, so all LPs can participate in ongoing dialog about reEnergize Program action areas in advance of and between each workgroup meeting. Communication is fostered through BaseCamp, an online document and event management system, where programmatic tools are collaborated on and shared.

Leverage Partners have also been engaged through several one-on-one interviews where reEnergize Program expectations were identified, specific organizational/business objectives for participation were ascertained, and detailed pledge information was discussed.

Leverage Partner meetings will be held regularly to report on the progress of the reEnergize Program, recognize partnership contributions, train new Leverage Partner participants, and offer workgroups an opportunity to present to the larger group. Local dignitaries, Department of Energy staff, and leaders from other cities around the nation will be welcomed guests at these meeting where the reEnergize Program can showcase success stories, discuss best practices, and sponsor national lessons learned sessions.

Table 4 summarizes the Leverage Partners with specific marketing and engagement strategy expertise. Workgroups will be held on a monthly or on an as-needed basis to coordinate and implement Leverage Partner pledges, including the potential development, production, and deployment of marketing and engagement tools. A full list of Leverage Partners, and their associated pledges are listed in Appendix A.

Table 4: Leverage Partners with Specific Marketing and Engagement Expertise

Leverage Partners	
AEA, LLC	MUD
City of Lincoln	Neighborhood Center
Destination Midtown	NBDC
Energy Pioneer Solutions	NeighborWorks
eFish	Omaha Advertising
Energy Rescue	Omaha Healthy Kids Alliance
FirstStar Fiber	P2RIC
Green Omaha Coalition	Progressive Property Inspections
Health & Energy Company	Think Green Consulting
Husker NRG Auditors	WasteCap
JISC	Weatherization Trust
Metro Community College	World Fellowship Christian Ministries, Inc.
Midtown Village	

Community Influencers

Socially-connected individuals have been identified in the Start Zones and surrounding communities to be leveraged as early adopters and reEnergize messengers. These individuals, referenced as Community Influencers, were recognized from their existing levels of community participation.

To profile individuals most likely to engage their community about adopting new programs, the following types of organizations were targeted, as well as positions:

- Education
  - Elementary Schools
    - Teachers
    - Assistant Principals
    - Principals
  - Middle Schools
    - Teachers
    - Assistant Principals
    - Principals
  - High Schools
    - Teachers
    - Assistant Principals
    - Principals/Deans
- Nonprofits
  - Board Members
- “Green” Organizations
  - Founders
  - Board Members
- Community Programs
  - Founders
  - Board Members
- Neighborhood Associations
  - Board Members
- Local Businesses
  - Business Owners
- Local Churches or Religious Organizations
  - Pastors/Leaders
  - Board Members

Engagement

Beyond the individual's occupations or obligations in the community, additional measurements of engagement were also analyzed, including:

- Amount of social media presence and frequency of use.
- Number of articles in the newspaper or online relating to their activities.
- Evidence of additional engagement in their community beyond just their occupation or primary obligation.
- Size of networks and connections.
- Number of promotional programs they have conducted in the community through organizations.

Both online and in-person Community Influencer lists were created to account for the differing networks and type of community participation. Online qualitative attributes that were considered in the selection of these individuals included:

- Online social media portfolio information,
- Hobbies,
- Interests, and
- Level of participation in online communities.

Research of these online Community Influencers was done through online data mining technology which monitors online habits and participation levels. In-person attributes considered included:

- Level of participation in local development projects, and
- Level of participation in community organizations.

Research of these in-person Community Influencers was done through internet monitoring of community participation, such as steering committee lists, boards members, sponsors, and active members of energy and sustainable initiatives. Participation levels were also pulled from sign-in sheets from local public meetings.

These individuals will be engaged through a community recruitment program where they are targeted through direct mail, e-mail, and follow-up invitation phone calls. At community recruitment meetings (and possibly via webinars), each Community Influencer will have the opportunity to enroll in the reEnergize Program if they live or own a business within the Start Zones. In addition, they will be trained and provided with education tools that they can use to effectively recruit participants through their own social networking.

MindMixer will be used as an online space where Community Recruiters can collaborate on and discuss reEnergize Program successes, improvements and implementation hurdles. This tool is described in more detail on page M/E - 21. Ongoing engagement will be initiated through MindMixer in addition to e-mails, newsletters, and engagement booths at community events.

Grassroots Organizations

Recognizing the power of face-to-face interactions and established communication channels within schools, neighborhoods, community gathering places and religious institutions, the reEnergize Program will foster relationships with existing networks within the Start Zones. Leading organizations have been identified as catalysts for grassroots engagement and will be used as local resources and messengers of reEnergize Program information.

These organizations are listed in Appendix B. Specific contacts at each will be identified.

Enrolled Participants

The reEnergize Program will be open to residential, commercial, and nonprofit participants in the Start Zones. Opportunities will be available for all income levels, including those who qualify for potentially free weatherization services through the Nebraska Energy Office and those who are currently loan eligible. The reEnergize Program is designed to serve each of these income groups equally, and the best spokespeople will be those who are already benefitting from reEnergize.

Enrolled participants will be provided with tools that allow them to spread the word among their neighbors, family and friends. These tools will be described in the Tools section on page M/E - 20.

Elected Officials and Nonprofits

Elected officials and nonprofit organizations representing or present in the Start Zones will be important in providing continuous and current information about the reEnergize Program, its goals and its successes. These individuals and organizations will be able to lend credibility to reEnergize and have existing communication mechanisms that can be leveraged to communicate with prospective participants. The elected officials and nonprofit list is located in Appendix C.

Tenants

Although property owners and managers are the primary target market for the reEnergize Program, tenants occupying commercial and residential buildings will be directly affected by the reEnergize Program process. Tenants may be in direct contact with Healthy Homes Reviewers or Energy Evaluators, and may also be interested in joining the program if they will soon own a home or building. It is important that we recognize tenants as message carriers and potential participants.

Branding

To ensure a consistent and accurate portrayal of the reEnergize Program as an entity, brand guidelines were created. reEnergize identity, promises, and visual elements were defined within the Brand Book (contained in full in Appendix D) and set the tone for messaging, and digital and printed materials. Excerpts from the Brand Book are included below.

Brand Archetype

The Brand Archetype informs the tone with which reEnergize is presented. The identity of reEnergize is contained within and should affect public perception of the reEnergize Program.

Primary: The Caregiver

- Supporter/advisor,
- Advocate,
- Nurturer,
- Service provider, and
- Altruist.

Secondary: The Sage

- Expert/guru,
- Philosopher/contemplative,
- Mentor/teacher,
- Investigator, and
- Analyst.

Brand Promises

Brand Promises are the broad, consumer-oriented ideas behind reEnergize that set the perspective from which messaging is constructed.

- reEnergize makes things easier.
- reEnergize will make me more comfortable.
- reEnergize looks out for my best interest (my bottom line, my home, my community).
- reEnergize cares about making a difference in my community and the world.
- reEnergize is resource for knowledge on sustainable buildings.

Name

The naming section sets standards for the use and placement of the reEnergize name.

reEnergize

reEnergize is the proper name of the program. The “re” should always appear in lowercase and “Energize” should always be capitalized. There is never a space between “re” and “Energize.”

reEnergize Program

When referencing the general program, it should be referred to as reEnergize or reEnergize Program.

Logo

The primary reEnergize Program logo also contains the tagline, “building energy smart communities.”

Messaging

Consistent messaging has been developed to be the foundational content for all educational, engagement and marketing materials. reEnergize Program content will be modified to best utilize each outreach mechanism and marketing tool as described in the following sections.

Overall Program Messaging

- The reEnergize Program is a collaborative effort between the Cities of Omaha and Lincoln to permanently transform the market for existing residential and commercial building energy upgrades.
- The reEnergize Program is a partnership with local residents to reinvest in their homes and neighborhoods.
- In total, more than $50 million of in-kind donations have been pledged by a growing number of Leverage Partners, who include utilities, institutions of higher education, community organizations, and State of Nebraska departments. The reEnergize Program will serve as a catalyst, intending to boost consumer demand and contractor supply for energy efficiency improvements by providing greater access to a skilled workforce, finance opportunities, and information.
- The result of our efforts will be a new level of consumer confidence and quality expectation set within the energy evaluation and energy upgrade market of the Greater Omaha and Greater Lincoln areas.
- The reEnergize Program will also support new green technologies and local entrepreneurship, increase public awareness by delivering clear and consistent consumer information on energy efficiency, and help identify appropriate financial mechanisms that support energy-saving improvements.

- An increased demand for energy evaluations and upgrades will strengthen opportunities for small businesses, and other complementary industries, to improve their capacity and abilities to serve this demand. Increased demand and the ability to bulk purchase and bundle services will drive down the cost of products and services and make them more widely accessible in both communities.
- The expected measurable outcomes of the project will be realized through increased energy savings and stimulate the economy in both Omaha and Lincoln by:
    - Evaluating and upgrading a total of 263 commercial and nonprofit buildings and 3,193 residences;
    - Creating or retaining approximately 323 jobs;
    - Potentially saving building owners an average of 25 percent in utility costs; and
    - Reducing greenhouse gas emissions.

Residential Messaging

- As a residential participant, you will be eligible to receive significant incentives to make improvements that save energy and improve the comfort of your home. You will also receive direct support to realize the most cost-effective energy conservation measures that are appropriate for your home.
- We want to partner with you to make you more comfortable in your home. We will review your home for existing health and safety concerns and work with you to improve the conditions that influence your level of comfort and safety.
- We don't expect you to be an energy expert. Our Participant Navigators serve as personal guides who help you through each stage of the enrollment, evaluation, and upgrade process. This means you'll have all the resources you need at hand from beginning to end.
- The reEnergize Program will streamline the energy evaluation and upgrade process and assure that the work is of the highest quality so you, as the homeowner, never have to worry about finding the right contractors and evaluating their work.
- We will strive to reduce the energy use of your home by 25 percent using the most cost-effective measures. This performance will be measured with both pre- and post-energy evaluations that utilize industry-recognized rating methodologies.
- The average cost of similar evaluation and upgrade services to reach approximately 25 percent energy savings is $6,500. At each stage, the reEnergize Program will set a not-to-exceed amount for participants. The remaining costs, up to a total of $6,500, will be paid through grant funds by the reEnergize Program.
- The reEnergize Program is aimed at partnering with local residents regardless of income, credit history, or payment constraints. In some cases, residential participants may qualify for specific, free evaluation and upgrade services if they meet criteria established by the Nebraska Energy Office.

- Payment for Energy Upgrades can be funded in many ways:
    - Home equity loans;
    - Home improvement loans;
    - Unsecured personal loan from your financial institution; and
    - Self-finance, from savings or other source

Commercial and Nonprofit Messaging

- As a non-residential participant, you are eligible for an energy evaluation of your current facilities, and you will receive a list of recommended energy conservation measures based on your specific needs.
- You will also receive assistance in developing a strategic plan for executing energy-saving improvements that can help you save money and improve the comfort of your building.
- The reEnergize Program will provide energy evaluations, ratings, and sustainable return on investment (SROI) reports, which will include any industry-specific processes, for all qualified commercial and nonprofit buildings.
- Commercial and nonprofit participants will be asked to submit an application demonstrating that the entity plans to make a good faith effort to upgrade their facilities in the near future. Such an application may include concurrence from an organization's leadership and demonstration of need for a strategic energy plan.

Contractor Messaging

- The reEnergize Program will work with community partners to recruit, train, qualify, and increase the number of skilled, professional Energy Evaluators and Energy Upgrade Contractors in the Omaha and Lincoln metropolitan areas.
- The reEnergize Program will coordinate with Leverage Partners to develop and deliver the necessary training for a new skilled workforce to perform project work. Training will focus on home and commercial-grade energy evaluations, Energy Star products and standards, energy efficient building science, and green construction techniques. In addition, Leverage Partners will provide education in life skills, business ethics, and job readiness. The efforts will specifically target recruitment of the unemployed, incumbent employees, and residents or businesses located within the Start Zones.
- The reEnergize Program will create pre-qualification requirements for all contractors bidding on work. The pre-qualification will include review of a contractor’s capability and capacity. Capability review will focus on meeting national certification and licensing requirements, as well as past work experience. The requirements and scoring criteria associated with becoming a member of the pre-qualified contractor pool will be consistent and clearly articulated. Energy Evaluators and Energy Upgrade Contractors will know the qualifications, scope of work, and contract details.
- The bidding process for the reEnergize Program will aggregate projects into bundles appropriately sized to provide opportunities for small, medium, and large contractors. The size of the bundle that contractors will be allowed to bid upon will be based on a

review of the contractor's capacity to deliver within a set time period. This will help create a level playing field where contractors bid only with others of similar capacity.

- The concept of bundling, or grouping, projects will provide contractors a larger number of projects, which should thereby reduce overhead associated with marketing and management of individual projects.
- It is in the interest of the program, the community, and the industry that all workers involved in the program are paid a competitive and livable wage. The program will adhere to the Davis-Bacon requirements and work to incorporate additional "high-roads agreements" in the interest of fair and balanced contracting of work.
- Prior to entering a home or business, data will be collected by the program and made accessible to the Energy Evaluator or Energy Upgrade Contractor. This will significantly reduce the amount of time required to prepare for contracted work and eliminate the need to collect data from third parties, such as utilities.
- Energy Evaluators and Energy Upgrade Contractors will be provided access to a program dashboard where they will upload report details and energy improvement information. This streamlined process will allow the energy-efficiency workforce to enter data while in the field via a touch tablet or laptop.
- As a Participant becomes involved with reEnergize, a Program Navigator will be assigned as the main point of contact. The Program Navigator will answer questions, help the Participant continue through the process, and facilitate communication with the Energy Evaluator and Energy Upgrade Contractor.

National BetterBuildings Program Messaging

- The BetterBuildings Program improves homes, offices, hospitals, schools, and other types of buildings across the nation by deploying energy efficiency technology, products, and tools. Federal funding of $508 million has allowed 41 state and local government leaders to expand the building improvement industry and pave the way for a cleaner energy future.
- BetterBuildings aims to:
    - Create or retain 30,000 jobs;
    - Complete 170,000 building upgrades;
    - Save consumers approximately $50 million annually on energy bills; and
    - Share key lessons learned and successful strategies with communities across the country.

Micro Target Marketing

InfoUSA and 2010 Census data will be used to further segment residents and businesses within the Start Zones to better communicate and mobilize consumer, contracting, and stakeholder markets. Tailored messaging, tools and strategies directed at individuals' interests, ownership stakes and social relevance will increase affective responses and mobilization subsequently.

Data pertinent to the needs of the reEnergize Program includes:

- Resident age
- Resident income/credit history
- Resident interests
- Technology usage
- Political affiliation
- Home age
- Home heating type
- Business age
- Business type (SIC and NAICS)
- Business size

This information will allow for more targeted messaging in the following categories:

- Health/Safety
- Comfort
- Environmental issues
- Political issues
- Positive/progressive social image
- The benefit of new technology/upgrades
- Income, credit history
- Property ownership
- Small or new businesses status

reEnergize Program Tools

Marketing and engagement tools will be tailored for each target market at each stage of reEnergize. Each tool will be tailored to appeal to reEnergize Program participants, recruiters and messengers in a call to action to participate in reEnergize while also engaging and educating their social networks.

Broad Outreach

reEnergize Program Website

The reEnergize Program's online centerpiece is reEnergizeProgram.org. This site will serve as a portal for participants and contractors, and it is an educational one-stop-shop for energy efficiency information resources. Interested residential and commercial participants can sign up for reEnergize, RSVP for an orientation, and, ultimately, self-navigate through the reEnergize Program process and financial opportunities. ReEnergize Program participants will be able to self-enroll through an online intake form.

Interested contractors will also be able to use the site to find reEnergize Program information and make a request to be contacted about workforce qualifications and training opportunities.

As the reEnergize Program develops, the website will be expanded to provide participants with a property "dashboard" linking to the reEnergize Program Mega Tool. This will allow the participant to track progress on a specific property and receive information from the Technical Services Implementation (TSI) group on costs and evaluations.

Social Media

reEnergize Program-specific social networking applications will be developed to promote reEnergize and generate ongoing excitement for participants and the general communities of Omaha and Lincoln. These viral marketing tools will have great potential to reach regional and national audiences as well. Initially, neighborhood groups, active city groups, and others will be investigated for potential social media outlets (i.e., “Friending” and “Liking” existing Facebook pages to expand outlets for our outreach message).

- Twitter will be used to disseminate reEnergize Program information and to engage participants and other social influencers by providing brief, time sensitive updates.
- Facebook will be used to engage existing online social networks and individuals in the Lincoln and Omaha communities. This application will also be used to spread reEnergize Program information and to assist in outreach to regular orientation meetings and community events.

MindMixer

MindMixer will be a tool initially available to a small subset of our target markets. This online collaboration tool will be used as a space where reEnergize Program successes, improvements, and implementation barriers can be discussed through meaningful dialog. These conversations will be used as method to track and engage in feedback about the reEnergize Program to assist in continuous improvements.

MindMixer will eventually become an online collaboration space where the broader online community is engaged in community-scale behavioral transformation focused on energy efficiency and resource conservation.

As the reEnergize Program develops, online social marketing tools will be deployed through the MindMixer site to give participants a badge associated with their online profile. This profile badge can link to their other social media accounts, such as Facebook and Twitter, further generating interest in energy efficiency in the participant’s extended community.

Media

To be the most consistent, timely, and reliable source of information, the reEnergize Program will utilize three media outlets to connect with target markets within Omaha and Lincoln: print media, radio, and television. All media outreach will correspond with significant reEnergize Program milestones.

Print Media

The reEnergize Program will use print media in two formats: feature news releases and pitch proposals. Print media outlets are listed in Table 5.

Feature News Releases

Feature news releases will be written on a quarterly basis to be distributed to large daily news resources, as well as smaller periodical publications. These stories will be written to increase exposure of reEnergize Program orientation opportunities and milestones.

Pitch Proposals

Pitch proposals with photo opportunities will be presented to the *Omaha World Herald* and the *Lincoln Journal Star* as an opportunity to display reEnergize Program successes at community events or at the completion of any reEnergize Program stage. Included in the pitch will be an opportunity to educate consumers on the goals of reEnergize while showcasing the effectiveness of an energy evaluation and energy upgrade. The reEnergize Program will select willing and interested participants to participate in the news story as well as coordinate interviews with interested Energy Evaluators, Energy Contractors, and City of Omaha and Lincoln reEnergize Program staff.

The reEnergize Program will identify the appropriate journalist to target at each of the large print media publications. An ideal journalist would be an advocate for local economic development and energy and resource conservation issues.

At each pitch proposal, the selected journalist will receive a detailed media kit including backgrounders, fact sheets, feature news releases, and reEnergize Program staff information. Digital media kits will also be available by request or through reEnergizeProgram.org.

Radio and Television

Public service announcements (PSA) will be developed in written format to be distributed to news radio and broadcast television media outlets on a quarterly basis. All PSAs will be used to announce orientation opportunities and drive listeners to the reEnergize Program website. Table 5 identifies radio and television networks that will receive a written PSA.

Table 5: Media Outlets

Omaha		
TV	**Print**	**Radio**
KMTV-TV	*Omaha World-Herald*	KKAR-FM
WOWT-TV	*Omaha Star*	KFAB-FM
KETV-TV	*City Weekly*	KOIL-AM
KPTM-TV	*The Reader*	KIOS-FM
KXVO-TV	*Midlands Business Journal*	
	The Creightonian (Creighton University)	
	Prairie Fire	

Lincoln		
TV	**Print**	**Radio**
KOLN-TV	*Lincoln Journal Star*	KFOR-AM
KLKN-TV	*Lincoln Business Journal*	KLIN-AM
KFXL-TV	*The Daily Nebraskan (UNL)*	KUCV-FM
KYNE-TV	*Prairie Fire*	KFGE-FM
KOLN-TV (Ch. 10-11)		KRNE-FM
KUON-TV		KRNU-FM
KLKN-TV (Ch. 8)		KZUM- FM
NET Television		
KFXL-TV		

Targeted Outreach

Introductory Letters

Direct mail invitations and introductory letters will be used to target new consumer and stakeholder targets at each stage of the reEnergize. These letters will provide general reEnergize Program information and offer opportunities for engagement. Information about reEnergize Program benefits and orientation opportunities will be included in each letter.

Both the City of Omaha and the City of Lincoln seals will be used on each introductory letter to help increase perceived validity of the reEnergize Program.

Phone Calls

Direct phone calls will be made to Community Influencers and Grassroots Organizations to help foster a relationship with a personal contact from the reEnergize Program. These phone calls will be initiated after introductory letters have been distributed.

Initial telephone conversations will also be used as a time to reach the key contact from each grassroots organization and to confirm and identify outreach and engagement opportunities including neighborhood and community events, as well as lead times, requirements and distribution reach of local advertising.

Local Advertising

The reEnergize Program will engage Grassroots Organizations to locally advertise the reEnergize Program through their existing communication and outreach mechanisms. Each entity will be provided electronic flyers and sign-up postcards to distribute and window posters that can be placed in highly trafficked community areas. Text for feature articles will be distributed to these resources on a quarterly basis.

Briefings

Quarterly electronic briefing letters will be sent to identified or interested local elected officials and nonprofit organizations. These letters are intended to be formal educational information about the project as well as a tool used to update them on the process and successes of the reEnergize Program.

Digital Media Kit

Leverage Partners, Community Influencers, and Grassroots Organizations will be provided a Quarterly Outreach Digital Media Kit that will be a consistent source of reEnergize Program information and progress to distribute to their customers, peers, members, employees, and contacts. This Digital Media Kit will include a presentation, content for bill stuffers, newsletters, billboards, e-mail blasts, websites, and social media.

Recruitment Meetings

At in-person or online community Recruitment Meetings, Community Influencers will have the opportunity to enroll in the reEnergize Program if they live or own a business within the Start Zones. In addition, they will be trained and provided education tools with which they will be empowered to effectively recruit participants through their own social networking. In essence, community Recruitment Meetings are an opportunity to train the trainer where they will be activated to take the reEnergize Program message to their peers.

Community Influencers will be invited through direct call and e-mail or mail invitations depending on available contact information.

ReEnergize Program Booklet

This is a simple, easy to navigate piece highlighting the reEnergize Program process, financing options, energy-saving tips, reEnergize Program contact information, and participation opportunities. Removable sign-up postcards will also be included. These tools will be available both as hard-copies and electronically.

Engagement Booths

With the relationships developed with Grassroots Organization, engagement booth opportunities will be identified at community events in the Start Zones. This will include block parties, conferences, church events, and neighborhood festivals.

Participant Promotion

The reEnergize Program will develop tools that utilize emotional appeals and social influence to persuade people to change behaviors. Advertising tools for participants will be developed, including reEnergize Program yard signs and window decals that advertise reEnergize on a neighbor-to-neighbor scale. As the participant progresses through enrollment, these tools can be customized to advertise specific performance indicators including money and energy saved.

E-mail Newsletters

Quarterly e-mail newsletters will be developed and sent to interested members of the public who have signed up via the website to receive reEnergize Program updates and information. Newsletter content will be developed to educate consumers about behavioral changes that can be made with little cost and demonstrate a significant positive impact. Additional information will include reEnergize Program updates as well as additional non-program-related energy efficiency initiatives.

Orientations

In-person, self-navigated, online, and lunch-hour webinar orientation meetings will be used to recruit consumer target markets into the reEnergize Program. These orientations will also be used to introduce the process, begin intake, and initiate a call to action to participate in reEnergize and to recruit their neighbors, family, and friends.

Prospective participants can learn about orientations in one of three ways:

- An invitation from a Program Navigator after signing up on the website, calling the hotline or returning a postcard;
- Recruitment from Enrolled Participants, a Community Influencer, or a Leverage Partner; or
- The reEnergize Program website.

Home Energy Score

The reEnergize Program will also assist a national energy rating pilot that compares energy efficiency in homes. The Home Energy Score Pilot provides a 1–10 score scale currently being tested in select cities that will be used to measure home energy performance. This program provides a comparable home efficiency score, much like miles per gallon values for cars. All calculations are based on location-specific data, allowing homeowners to compare scores locally, see the benefit of possible energy upgrades, and understand the value of their home from an energy efficiency perspective. Certain reEnergize Program participants will be among the first in the country to learn more about the energy performance of their home using this scale.

Continuous Improvement

Monitoring success and evaluating effectiveness of marketing and engagement tools and tactics at each stage of the reEnergize Program is a priority. Tracking and reflecting on performance allows for continuous improvement and refinement of strategy and tool use. The rate of success for each tool will help to identify specific goals for future stages. Tools that prove a high rate of successful participants will be maximized while tools that have a less successful recruitment rate will be reevaluated.

Quantitative Monitoring

Participant attrition will be monitored at each reEnergize Program phase. Marketing and engagement strategies will be adjusted as necessary if goals are not being met.

Quantitative effectiveness of marketing and engagement efforts will be monitored through the following mechanisms:

- Website visit analytics;
- Social media analytics;
- "How did you hear" submission requirements on intake forms;
- Tool distribution tracking; and
- U.S. DOE reporting metrics, including:
    - Number of target audience contacted through outreach mechanisms,
    - Percent of total audience contacted through outreach mechanisms,
    - Number of target audience that participated in the reEnergize Program, and
    - Percent of total audience participated in reEnergize Program.

Outreach mechanisms tracked to obtain the necessary information include:

- Direct mail
- Social media (Facebook and Twitter)
- Website
- Hotline
- Webinars
- Orientations
- Newsletters
- MindMixer
- Media
- Local Advertising at Community Locations
- Business Outreach
- Direct Phone Calls
- Quarterly Brief
- Recruiter Meetings
- Engagement Booths

Qualitative Monitoring

Feedback about reEnergize Program successes, implementation hurdles and barriers to achievement will be monitored throughout each stage of reEnergize. Feedback could include comments received directly from Leverage Partners, Community Influencers, participants and contractors doing the work. It could also include comments received from other BetterBuildings grantees, the U.S. Department of Energy, Lawrence Berkley Laboratory, universities, and questions posed at presentations or through general contact mechanisms.

Qualitative effectiveness of marketing and engagement efforts will be monitored through the following mechanisms:

- Conversation monitoring and tracking on MindMixer;
- Weekly contact reports of participant conversations;
- Media monitoring; and
- Brief assessments/surveys presented to participants at the end of enrollment phase and once energy upgrades are completed (at the end of reEnergize).

Lessons Learned

Because the reEnergize marketing and engagement strategy takes an approach of continuous improvement, descriptions of stage-specific implementation, strategies and tools will be added to this document as the reEnergize Program progresses. The result will be a broad, objective view of reEnergize Program engagement coupled and enhanced by detailed information from which successes can be replicated.

If changes are made to the overall reEnergize Program Strategy section as a result of our experience-based learning, these items will be documented here after completion of each stage.

reEnergize
building energy smart communities

Marketing and Engagement Strategy

Stage 1

January 2011

Stage 1 Marketing and Engagement Strategy

Overview

The Stage 1 Marketing and Engagement program is designed to create a foundation of education and awareness in the Start Zones that will be built upon and refined in future stages. In addition to meeting specific enrollment targets, the primary goals of this stage are to establish a presence in the Start Zones, generate participant excitement and enrollment, provide accessible information to consumers, and engage Grassroots Organizations and Community Influencers to become program messengers.

This section is intended to serve as the playbook for marketing and engagement activities in Stage 1; it will be modified and further customized in future stages as the program grows and more is learned about which strategies are effective. Additional chapters will be added for future stages.

Program Implementation

Staging

Stage 1 of the program was initiated in January 2011 and will continue through June 2011. A preliminary Pilot Stage (part of Stage 1 of the program) was initiated on February 28, 2011 and conducted through March 21, 2011.

Upgrade Goals

Enrollment targets for the Pilot Stage and Stage 1 are highlighted in Table 6.

Table 6: Stage 1 and Pilot Upgrade Goals

	Pilot	The Rest of Stage 1	Total
Residential	80	243	323
Commercial/ Nonprofit	0	26	26

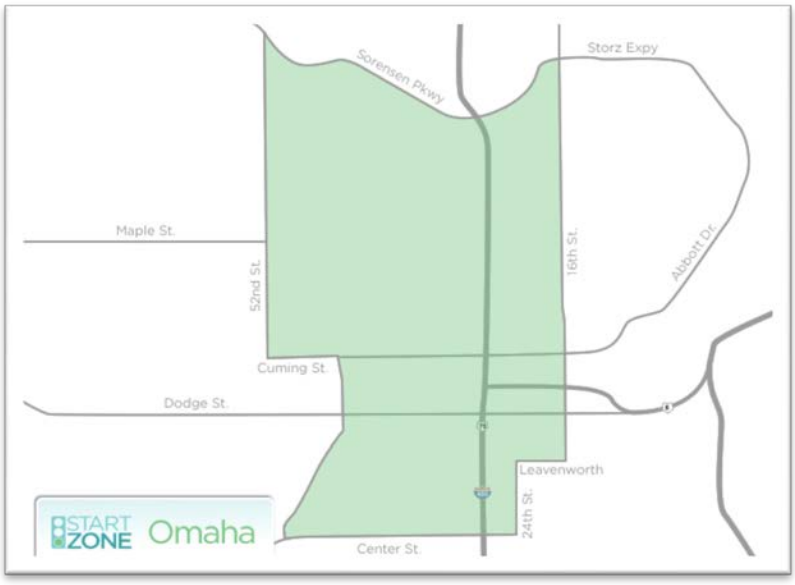
Start Zones

The Omaha Start Zone for the Pilot of Stage 1 is bound from Lake Street to Leavenworth Street, 16th Street to 36th Street. During the one month Pilot, specific targeting of single-family homeowners occurred.

Figure 1: Omaha Pilot Start Zone

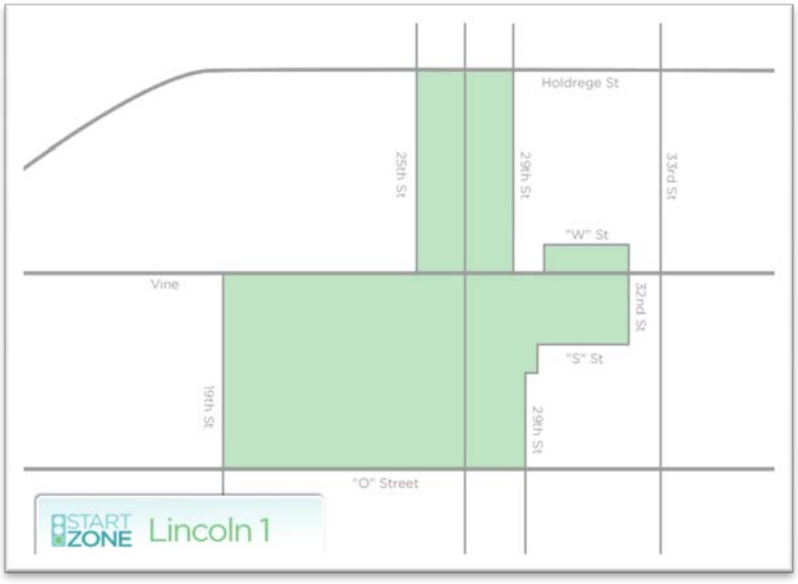
Following the Pilot, the Stage 1 Start Zone boundaries will expand to include the development project boundaries of Destination Midtown and the North Omaha Development Project. During Stage 1, all of the Omaha Start Zone will be targeted through marketing and outreach.

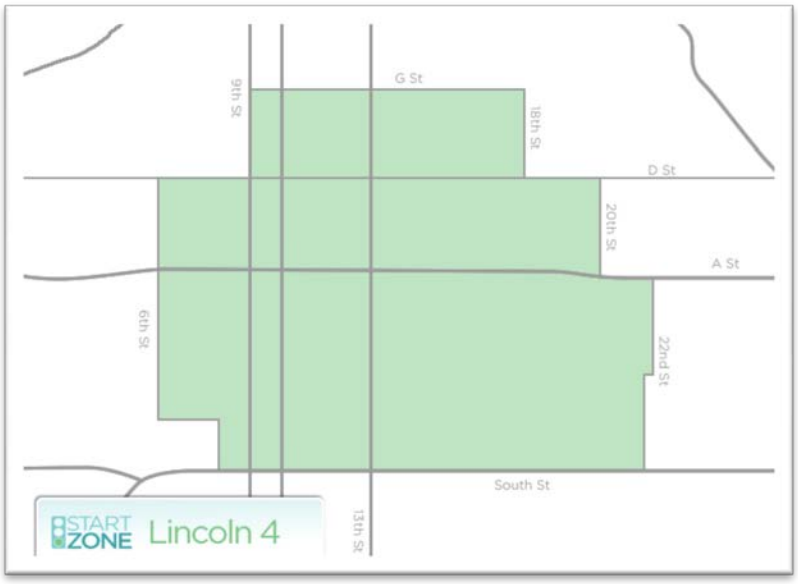
Figure 2: Omaha Stage 1 Start Zone



In Lincoln, targeted Start Zones for Stage 1 will include Start Zone 1 and Start Zone 4, which were selected due to a concentration of existing relationships with reEnergize Program staff on current redevelopment projects in the area. In addition, the Lincoln Start Zone 2 will be participating in the Lincoln Energy Challenge, conducting a neighborhood energy renovation project that will be leveraged throughout Stage 1. Marketing and engagement outreach will expand to all four areas through Stage 5 of the program, although participants in each Start Zone can participate at any stage.

Figure 3: Lincoln Stage 1 Start Zones





Target Market Analysis and Outreach Strategies

Consumer Market

During Stage 1, marketing and engagement efforts will focus on owner-occupied building owners because they are in a position to make direct decisions about home improvements. Table 7 indicates the total number of owner-occupied, single-family residential properties, and owner-occupied commercial and nonprofit buildings within the Omaha and Lincoln Start Zones for Stage 1.

Table 7: Number of Consumer Targets in the Pilot and Stage 1 Start Zones

Omaha	Pilot	Stage 1
Residential: Owner-Occupied - Single	711	10,154
Commercial: Owner-Occupied	N/A	161
Lincoln		
Residential: Owner-Occupied - Single	N/A	1,438
Commercial: Owner-Occupied	N/A	210

The reEnergize Program aims to provide programming assistance and to identify financing options for program participants so that they secure funding, if needed. Financial assistance mechanisms have not been fully established for utilization in Stage 1, therefore, all Stage 1 participants must have the financial capability and resources to fund program upgrades. This entails paying out of pocket via personal funds or securing a loan from a financial institution.

The reEnergize Program is also trying to identify potential financing mechanisms for people who cannot pay out of pocket and who do not directly qualify for a loan. In addition, the program is attempting to work with the Nebraska Energy Office to provide supplemental energy evaluation and upgrade services to participants with meager incomes who qualify for free weatherization services.

Outreach strategies for the Pilot and Stage 1 Consumer Market follow.

Commercial and Nonprofit: Owner-Occupied

Direct mail introductory letters will be sent to commercial and nonprofit owner-occupied buildings that have been issued a building permit in the last three years.

Residential: Owner-Occupied - Single

- Direct mail Pilot introductory letters will be sent to the 199 single-family homes that have been issued a building permit in the last three years, that are older than 1970 and that have a home value of over $70,000.

- Direct mail Pilot enhancement letters will be sent to the 711 owner-occupied single-family homes in the Pilot area Start Zone.
- Direct mail introductory letters and orientation invitations will be sent to all individuals who showed interest in the program through the initial sign-up web site and hotline
- Direct mail introductory letters will be sent to all owner-occupied single-family homes in the expanded Stage 1 Start Zone that have been issued a building permit in the last three years, that are older than 1970 and that have a home value over $70,000.

Contracting Market

During Stage 1, the reEnergize Program will engage Energy Evaluators and Energy Upgrade Contractors through a variety of mechanisms. This will include presentations to industry groups, development of a listserv for notifications, and coordination with local green training programs.

In the Omaha market, the program will coordinate efforts with the City of Omaha's Small and Emerging Business Program. The reEnergize Program will encourage all contractors, who meet the criteria to be considered a small business, to become certified with this city program. In addition, the reEnergize Program will require all contractors competing for small-sized bundled contracts of Omaha properties to be certified as Tier I or Tier II Small and Emerging Business Program.

As a federally funded program, the reEnergize Program must meet certain workforce requirements, including but not limited to the Davis Bacon Act. The Davis Bacon Act assures that construction and trade labor working on a program receive the local prevailing wages for their type of work. The reEnergize Program will work with local contractors to comply with and complete the Davis Bacon reporting requirements.

Stakeholders

During Stage 1, marketing and engagement efforts will focus on Leverage Partners, Community Influencers, Grassroots Organizations, Enrolled Participants, and Elected Officials and Nonprofits. Outreach strategies for the Pilot and Stage 1 Stakeholders follow.

Leverage Partners

- Leverage Partner interviews were held from November 2010 through January 2011 to identify program expectations and specific organizational/ business objectives for participating in the program as well as to discuss detailed pledge information.
- An Annual Leverage Partner meeting was held to report on the progress of the program.
- A digital media kit will be provided to all Leverage Partners so they can distribute program information through their existing communication mechanisms. Specific coordination for commercial and nonprofit owner-occupied buildings will take place with Destination Midtown, Nebraska Business Development Corporation (NBDC), and WasteCap Nebraska.

- Specific coordination for residential owner-occupied single-family homes will take place with Destination Midtown, MUD, LES, OPPD, City of Lincoln, Omaha Healthy Kids Association, Rebuilding Together, Midtown Village, NeighborWorks Omaha, the Neighborhood Center, and NIFA will be used to ensure program information distribution.
- Digital Media Kits will be used and distributed through specifically-pledged outreach mechanisms shown in Table 8.

Table 8: Leverage Partner Outreach Mechanisms

Leverage Partner	Bill Stuffers	Newsletters	Billboards	E-mail Blasts	Website	Social Media	Postcards	Presentations
MUD	X				X			
Omaha Economic Development Corporation	X	X						
FirstStar Fiber	X							
Green Omaha Coalition			X		X			
City of Lincoln					X			
City of Omaha					X			
Neighborhood Center	X				X			
Destination Midtown		X		X	X		X	
LES					X			
Rebuilding Together								
Omaha Healthy Kids Alliance								X
Wilburn Construction								X
North Omaha Design Studios								X
AEA, LLC					X			
Metro Community College		X		X	X			
Nebraska Business Development Corporation		X		X	X			X

Community Influencers

- Engagement phone calls will be made to Community Influencers who have existing relationships with reEnergize Program staff. These Community Influencers will be provided a direct mail Pilot 80 letter to pass to their existing networks. Those with existing online networks will also be provided social media text.
- Community Influencers will be invited to one of four recruitment meetings in Stage 1 of the program. This includes one online meeting and one in-person meeting each for Omaha and Lincoln. At the recruitment meetings, Community Influencers can sign up for the program and be trained to participate as a leader for their community to recruit and engage their neighbors, friends and family. Program Booklets and intake forms will be available online.

- Community Influencers will be provided digital and paper Program Booklets to use as educational tools to recruit their friends, family and neighbors into the program.
- MindMixer will be used as an online space where all the Community Influencers can collaborate on program successes, improvements and implementation hurdles.
- Follow up phone calls will be made to Community Influencers who did not participate in a recruitment meeting to find engagement opportunities, lead times, contacts, and existing groups or events.

Grassroots Organizations

- Direct mail introductory letters will be sent to all grassroots organizations to engage them in the program and help them become messengers for their communities.
- Follow-up phone calls will be made to all grassroots organizations to find engagement presentation and promotion opportunities, lead times, contacts, and existing groups or events.
- Electronic local advertizing will be distributed to grassroots organizations to publish in their existing outreach mechanisms and will include feature article text, flyers, and sign-up postcards to distribute, and window posters for highly trafficked community areas.
- Existing meetings, such as neighborhood association meetings and PTAs have been identified where program presentations can be made.

Elected Officials and Nonprofits

- Direct mail introductory letters will be sent to all identified elected officials and nonprofit organizations.
- Elected Officials will be provided digital and paper Program Booklets to use as educational tools to inform their constituents.
- Nonprofits will be provided electronic flyers and sign-up postcards to print and/or electronically distribute, and window posters to be posted in highly trafficked community areas.

Enrolled Participants

- Enrolled participants will be provided with recruitment education tools, allowing them to spread the word among their neighbors, family, and friends.

Messaging

Pilot Outreach

Direct Mail Messaging

- The reEnergize Program, launched in January, is a collaboration between the Cities of Omaha and Lincoln to transform the market for existing residential and commercial building energy upgrades.
- We are now opening enrollment to select single-family homeowners who will pioneer the program.
- As a participant, you will be eligible to receive significant incentives to make energy-saving improvements to your home. These enhanced benefits will not be available when the full program launches later this year. You will also receive direct support to realize the most cost-effective energy conservation measures for your home.

Handout Messaging

- What's the big deal with the Pilot 80?
  - Actually, it is a big deal. The Pilot 80 stage of reEnergize offers significant incentives not available to anyone else or at any other time in the program. Think of it like an exclusive Early Bird Special
- What are the benefits of the Pilot 80?
  - We'll break it down:
  - Home energy upgrades can cost as much as $6,500
  - We'll set your out-of-pocket cap at $3,000
  - We'll cover the rest
  - That's $3,500 in potential savings!
  - After the Pilot 80, these discounts and incentives change
  - You get to have a voice in the development of this program
  - You get a free health and safety review of your home

Overall Program Messaging

- The reEnergize Program is a collaborative effort between the Cities of Omaha and Lincoln to permanently transform the market for existing residential and commercial building energy upgrades.
- The reEnergize Program is a partnership with local residents to reinvest in their homes and neighborhoods.

- In total, more than $50 million of in-kind donations have been pledged by a growing number of Leverage Partners, who include utilities, institutions of higher education, community organizations, and State of Nebraska departments. The reEnergize Program will serve as a catalyst, intending to boost consumer demand and contractor supply for energy efficiency improvements by providing greater access to a skilled workforce, finance opportunities, and information.
- The result of our efforts will be a new level of consumer confidence and quality expectation set within the energy evaluation and energy upgrade market of the Greater Omaha and Greater Lincoln areas.
- The reEnergize Program will also support new green technologies and local entrepreneurship, increase public awareness by delivering clear and consistent consumer information on energy efficiency, and help identify appropriate financial mechanisms that support energy-saving improvements.
- An increased demand for energy evaluations and upgrades will strengthen opportunities for small businesses, and other complementary industries, to improve their capacity and abilities to serve this demand. Increased demand and the ability to bulk purchase and bundle services will drive down the cost of products and services and make them more widely accessible in both communities.
- The expected measurable outcomes of the project will be realized through increased energy savings and stimulate the economy in both Omaha and Lincoln by:
    - Evaluating and upgrading a total of 263 commercial and nonprofit buildings and 3,193 residences;
    - Creating or retaining approximately 323 jobs;
    - Potentially saving building owners an average of 25 percent in utility costs; and
    - Reducing greenhouse gas emissions.

Residential Messaging

- As a residential participant, you will be eligible to receive significant incentives to make improvements that save energy and improve the comfort of your home. You will also receive direct support to realize the most cost-effective energy conservation measures that are appropriate for your home.
- We want to partner with you to make you more comfortable in your home. We will review your home for existing health and safety concerns and work with you to improve the conditions that influence your level of comfort and safety.
- We don’t expect you to be an energy expert. Our Participant Navigators serve as personal guides who help you through each stage of the enrollment, evaluation, and upgrade process. This means you’ll have all the resources you need at hand from beginning to end.
- The reEnergize Program will streamline the energy evaluation and upgrade process and assure that the work is of the highest quality so you, as the homeowner, never have to worry about finding the right contractors and evaluating their work.

- We will strive to reduce the energy use of your home by 25 percent using the most cost-effective measures. This performance will be measured with both pre- and post-energy evaluations that utilize industry-recognized rating methodologies.
- The average cost of similar evaluation and upgrade services to reach approximately 25 percent energy savings is $6,500. At each stage, the reEnergize Program will set a not-to-exceed amount for participants. The remaining costs, up to a total of $6,500, will be paid through grant funds by the reEnergize Program.
- The reEnergize Program is aimed at partnering with local residents regardless of income, credit history, or payment constraints. In some cases, residential participants may qualify for specific, free evaluation and upgrade services if they meet criteria established by the Nebraska Energy Office.
- Payment for Energy Upgrades can be funded in many ways:
    - Home equity loans;
    - Home improvement loans;
    - Unsecured personal loan from your financial institution; and
    - Self-finance, from savings or other source

Commercial and Nonprofit Messaging

- As a non-residential participant, you are eligible for an energy evaluation of your current facilities, and you will receive a list of recommended energy conservation measures based on your specific needs.
- You will also receive assistance in developing a strategic plan for executing energy-saving improvements that can help you save money and improve the comfort of your building.
- The reEnergize Program will provide energy evaluations, ratings, and sustainable return on investment (SROI) reports, which will include any industry-specific processes, for all qualified commercial and nonprofit buildings.
- Commercial and nonprofit participants will be asked to submit an application demonstrating that the entity plans to make a good faith effort to upgrade their facilities in the near future. Such an application may include concurrence from an organization's leadership and demonstration of need for a strategic energy plan.

Contractor Messaging

- The reEnergize Program will work with community partners to recruit, train, qualify, and increase the number of skilled, professional Energy Evaluators and Energy Upgrade Contractors in the Omaha and Lincoln metropolitan areas.
- The reEnergize Program will coordinate with Leverage Partners to develop and deliver the necessary training for a new skilled workforce to perform project work. Training will focus on home and commercial-grade energy evaluations, Energy Star products and standards, energy efficient building science, and green construction techniques. In addition, Leverage Partners will provide education in life skills, business ethics, and job

readiness. The efforts will specifically target recruitment of the unemployed, incumbent employees, and residents or businesses located within the Start Zones.

- The reEnergize Program will create pre-qualification requirements for all contractors bidding on work. The pre-qualification will include review of a contractor's capability and capacity. Capability review will focus on meeting national certification and licensing requirements, as well as past work experience. The requirements and scoring criteria associated with becoming a member of the pre-qualified contractor pool will be consistent and clearly articulated. Energy Evaluators and Energy Upgrade Contractors will know the qualifications, scope of work, and contract details.
- The bidding process for the reEnergize Program will aggregate projects into bundles appropriately sized to provide opportunities for small, medium, and large contractors. The size of the bundle that contractors will be allowed to bid upon will be based on a review of the contractor's capacity to deliver within a set time period. This will help create a level playing field where contractors bid only with others of similar capacity.
- The concept of bundling, or grouping, projects will provide contractors a larger number of projects, which should thereby reduce overhead associated with marketing and management of individual projects.
- It is in the interest of the program, the community, and the industry that all workers involved in the program are paid a competitive and livable wage. The program will adhere to the Davis-Bacon requirements and work to incorporate additional "high-roads agreements" in the interest of fair and balanced contracting of work.
- Prior to entering a home or business, data will be collected by the program and made accessible to the Energy Evaluator or Energy Upgrade Contractor. This will significantly reduce the amount of time required to prepare for contracted work and eliminate the need to collect data from third parties, such as utilities.
- Energy Evaluators and Energy Upgrade Contractors will be provided access to a program dashboard where they will upload report details and energy improvement information. This streamlined process will allow the energy-efficiency workforce to enter data while in the field via a touch tablet or laptop.
- As a Participant becomes involved with reEnergize, a Program Navigator will be assigned as the main point of contact. The Program Navigator will answer questions, help the Participant continue through the process, and facilitate communication with the Energy Evaluator and Energy Upgrade Contractor.

National BetterBuildings Program Messaging

- The BetterBuildings Program improves homes, offices, hospitals, schools, and other types of buildings across the nation by deploying energy efficiency technology, products, and tools. Federal funding of $508 million has allowed 41 state and local government leaders to expand the building improvement industry and pave the way for a cleaner energy future.

- BetterBuildings aims to:
    - Create or retain 30,000 jobs;
    - Complete 170,000 building upgrades;
    - Save consumers approximately $50 million annually on energy bills; and
    - Share key lessons learned and successful strategies with communities across the country.

Micro Target Marketing

InfoUSA and 2010 Census data will be used to further segment residents and businesses within the Start Zones to better communicate and mobilize consumer, contracting, and Stakeholder markets. Tailored messaging, tools and strategies directed at individuals' interests, ownership stakes and social relevance will increase affective responses and mobilization subsequently.

Data pertinent to the needs of the reEnergize Program includes:

- Resident age
- Resident income/credit history
- Resident interests
- Technology usage
- Political affiliation
- Home age
- Home heating type
- Business age
- Business type (SIC and NAICS)
- Business size

This information will allow for more targeted messaging in the following categories:

- Health/Safety
- Comfort
- Environmental issues
- Political issues
- Positive/progressive social image
- The benefit of new technology/upgrades
- Income, credit history
- Property ownership
- Small or new businesses status

Stage 1 Tools

Marketing and engagement tools will be tailored for all categories of Stage 1 target markets, issuing a call to action to consumers, contractors, and stakeholders to participate in the program and activate their own social networks.

These tools and their associated target market are shown in Table 9.

Table 9: Tools and Associated Target Markets for Stage 1

Tools	Target Markets: Commercial and Nonprofit: Owner-Occupied	Residential: Owner-Occupied - Single	Contractors	Community Influencers	Grassroots Organizations	Enrolled Participants	Elected Officials and Nonprofits	Leverage Partners
Program Booklet	X	X		X		X		
Program Website	X	X	X	X	X	X	X	X
Social Media (Facebook and Twitter)	X	X	X	X	X	X	X	X
MindMixer				X				X
Electronic Local Advertising (flyer, feature article, window poster, sign-up postcards)	X	X			X			
Introductory Letter	X	X		X	X		X	
Electronic Briefing							X	
Digital Media Kit			X	X	X			X
Direct Phone Call				X				
Recruitment Meeting				X				
Orientation Meeting	X	X				X		
Home Energy Score Program		X		X		X		

Broad Outreach

Some outreach tools and strategies apply to all targets. They include:

Website

The reEnergize Program website will be used as the online centerpiece where potential participants can get all information regarding the program (one-stop shop) for consumer information as well as self-enroll in the program.

Social Media

Social Media will be used to draw established on-line communities to the program, promote events and provide ongoing status updates on the program.

MindMixer

During Stage 1, MindMixer will only be used as an online space where Community Influencers and Leverage Partners can collaborate on program successes, improvements, and implementation hurdles.

Media Plan

Because the Start Zones represent such a small component of the overall markets in Omaha and Lincoln, media use will be minimal and very selective during the Pilot and Stage 1. Media outreach will increase in Stage 2. However, all media outreach will correspond with significant program milestones; in Stage 1, identified earned media opportunities will be used for primary media correspondence, such as the Clean Energy Road Show.

Targeted Outreach

Introductory Letters

Direct mail invitations and introductory letters will be used to target consumer and stakeholder targets for Stage 1. Information about program benefits and orientation opportunities will be included in each letter.

Direct mail introductory letters will be sent to the following targets:

- The Pilot 199 single-family homes that have been issued a building permit in the last three years, that are older than 1970 and that have a home value over $70,000;
- The 711 single-family homes in the Pilot area Start Zone;
- All single-family homes in the expanded Stage 1 Start Zone that have been issued a building permit in the last three years, that are older than 1970 and that have a home value over $70,000;
- Commercial and nonprofit owner-occupied buildings that have been issued a building permit in the last three years; and
- All grassroots contacts in the Start Zones, including churches, schools, nonprofits and community gathering places.

Phone Calls

Direct phone calls will be made to Community Influencers who have existing relationships with reEnergize Program staff. These Community Influencers will be provided a direct mail Pilot letter to pass through their existing social networks. Those with existing online social networks will also be provided social media text. Direct phone calls will also be made to grassroots organizations following an introductory letter and to all Community Influencers who do not RSVP or attend a community Recruitment Meeting.

Local Advertising

Grassroots Organizations will be provided electronic flyers and sign-up postcards to distribute and window posters for highly trafficked community areas. Text for feature articles will also be distributed.

Briefings

Electronic briefing letters will be sent to identified Elected Officials and nonprofits.

Digital Media Kit

Leverage Partners, Community Influencers, and Grassroots Organizations will be provided a Digital Media Kit that will include a program presentation, content for bill stuffers, newsletters, billboards, e-mail blasts, websites, and social media.

Recruitment Meetings

Community Influencers will be invited to one of four in-person or web-based recruitment meetings in Stage 1 of the program. This includes one online meeting and one in-person meeting each for Omaha and Lincoln.

Orientation

Stage 1 orientations will be held through May 2011. Each orientation will be hosted at the same central location (see Table 10) every other week in both Omaha and Lincoln. Additionally, Pilot Orientations will be held at both of these noted locations as well as Salem Baptist Church and Augustana Church in Omaha.

Table 10: Orientation Locations

Omaha	Lincoln
Columbus Community Center 1515 S. 24th St. 5:30 pm – 7:30 pm	Auld Pavilion 1650 Memorial Park Drive Antelope Park 5:30 pm – 7:30 pm

As Stage 1 progresses, online orientation opportunities will be developed.

Prospective participants can learn about orientations in one of three ways:

- An invitation from a Program Navigator after signing up on the website, calling the hotline or returning a postcard;
- Recruitment from another participant, a Community Influencer or a Leverage Partner; or
- The program website.

Program Booklet

Hardcopy or digital Program Booklets will be provided to all orientation attendees and Community Influencers.

Home Energy Score

The reEnergize Program will also assist a national energy rating pilot that compares energy efficiency in homes. The Home Energy Score Pilot provides a 1–10 score scale currently being tested in select cities—Omaha and Lincoln included—that will be used to measure home energy performance. This program will be used as a marketing tool to attract recruit participants into the program by offering them a tangible incentive to showcase on the value of their home.

Continuous Improvement

Monitoring success and evaluating effectiveness of marketing and engagement tools and tactics at each stage of the reEnergize Program is a priority. Tracking and reflecting on performance allows for continuous improvement and refinement of strategy and tool use. The rate of success for each tool will help to identify specific goals for future stages. Tools that prove a high rate of successful participants will be maximized while tools that have a less successful recruitment rate will be reevaluated.

Quantitative Monitoring

Participant attrition will be monitored at each program phase. Marketing and engagement strategies will be adjusted as necessary if goals are not being met. The steps that will be tracked include sign-up, orientation, utility qualification, healthy homes review, financial pre-qualification, energy evaluation, and energy upgrade.

Quantitative effectiveness of marketing and engagement efforts will be monitored through the following mechanisms:

- Website visit analytics;
- Social media analytics;
- “How did you hear” submission requirements on intake forms;
- Tool distribution tracking; and
- U.S. DOE reporting metrics, including:
    - Number of target audience contacted through outreach mechanisms,
    - Percent of total audience contacted through outreach mechanisms,
    - Number of target audience that participated in program, and
    - Percent of total audience participated in program.

Outreach mechanisms tracked to obtain the necessary information include:

- Direct mail
- Social media (Facebook and Twitter)
- Website
- Hotline
- Webinars
- Orientations
- Newsletters
- MindMixer
- Media
- Local Advertising at community locations

Qualitative Monitoring

Feedback about program successes, implementation hurdles and barriers to achievement will be monitored throughout each stage of the program. Feedback could include comments received directly from Leverage Partners, Community Influencers, participants and contractors doing the work. It could also include comments received from other BetterBuildings grantees, the U.S. Department of Energy, Lawrence Berkley Laboratory, universities, and questions posed at presentations or through general contact mechanisms.

Qualitative effectiveness of marketing and engagement efforts will be monitored through the following mechanisms:

- Conversation monitoring and tracking on MindMixer;
- Weekly contact reports of participant conversations;
- Media monitoring; and
- Brief assessments/surveys presented to participants at the end of enrollment phase and once energy upgrades are completed (end of program).

Lessons Learned

[To be completed at the end of Stage 1]

reEnergize
building energy smart communities

Marketing and Engagement Strategy

Appendices

January 2011

Appendix A: Leverage Partner Pledges

CI: Consumer information
FM: Financial mechanisms
GT: Technical support
MS: Overall market strategy
NA: Neighborhood advocacy
UP: Upgrade
WD: Workforce development

Theme Area							Name of Organization	Organization Address	Contact Person
CI	FM	GT	MS	NA	UP	WD			
x		x		x		x	AEA, LLC	16868 Locust St, Omaha, NE 68116	Jesse Krivolavek
x	x	x	x	x	x	x	City of Lincoln	555 S 10th St, Lincoln, NE 68508	Milo Mumgaard
			x		x		City of Omaha	1819 Farnam St, Omaha, NE 68183	Kristi Wamstad-Evans
x			x	x			Destination Midtown (GOCC)	1301 Harney St, Omaha, NE 68102	Jamie Grayson-Berglund
	x	x	x		x		eFish	16867 Locust St, Omaha, NE 68116	Jesse Krivolavek
x	x	x				x	Energy Pioneer Solutions	3030 S Marian Rd, Hastings, NE 68901	Scott Kleeb
				x			Energy Rescue, Inc.	4826 S 19th St, Omaha, NE 68107	Tonya Ward
		x					Energy Systems Laboratory	1110 S 67th St, Omaha, NE 68182	Mingsheng Liu
x	x	x					Firstar Fiber, Inc.	10330 "I" St, Suite 100, Omaha NE 68127	Dale Gubbels
						x	Greater Omaha Chamber of Commerce	1301 Harney St, Omaha, NE 68102	Andrew Rainbolt; Othello Meadows
x		x	x				Green Omaha Coalition	PO Box 3127, Omaha , NE 68103	Nicolette Amundson
x		x				x	Health & Energy Company	3316 Augusta Ave, Omaha, NE 68144	Jon Traudt
x							Husker NRG Auditors	PO Box 431, 750 S 64th Rd, Nebraska City, NE 68410	John Thomas
x		x	x	x	x	x	Joslyn Institute for Sustainable Communities	1004 Farnam St, Ste 101, Omaha, NE 68102	W. Cecil Steward; Katie Torpy
					x		Lincoln Action Program	210 O St, Lincoln, NE 68508	Vi See
	x					x	Lincoln Electric System (LES)	1040 P St, Lincoln, NE 68508	Marc Shkolnick
	x						Lincoln Lending Group	327 Park Vista St, Lincoln, NE 68510	Scott Janike
x		x	x			x	Metropolitan Community College	PO Box 3777, Omaha, NE 68103	Daniel Lawse
	x		x				Metropolitan Utilities District	1723 Harney St, Omaha, NE 68102	Karri Buglewicz

Theme Area							Name of Organization	Organization Address	Contact Person
CI	FM	GT	MS	NA	UP	WD			
				x			Midtown Village	4020 B St, Lincoln, NE 68510	Nancy Intermill
x		x					Nebraska Business Development Center	6001 Dodge St, RH 308; Omaha, NE 68182	Jean Waters; Bob Bernier
	x						Nebraska Energy Office	1100 O St, Lincoln, NE 68508	Bonnie Ziemann; Julie Hendricks
						x	Nebraska Workforce Development	550 S 16th St, Lincoln, NE 94600	Lorena Hernandez
				x			Neighborhood Center	115 S 49th Ave Omaha, NE 68132	Crystal Rhoades
x			x		x		NeighborWorks Omaha	1701 N 24th St, Ste 102, Omaha, NE 68110	Ken Lyons
	x						NIFA	1230 O Street, Ste 200, Lincoln, NE 68508	Steve Peregrine
x			x	x			Omaha Advertising	6004 Lafayette Ave, Omaha, NE 68132	Kurt Goetzinger
					x		Omaha Economic Development Corporation	2221 N 24th St, Omaha, NE 68110	Michael Maroney; Annette Aretherton
x	x			x			Omaha Healthy Kids Alliance	5006 Underwood Ave, Omaha, NE 68132	Kara Eastman
		x					Omaha Home Energy Analysis and Testing (O-HEAT)	6323 N 115th Cir, Omaha, NE 68164	Mark Loscutoff
	x				x	x	Omaha Public Power District (OPPD)	444 S 16th St, Omaha, NE 68102	Karisa Vlasek
x							P2RIC	6001 Dodge St, RH308, Omaha, NE, 68182	Rick Yoder
x					x		Progressive Property Inspections	1102 W 7th St, Wayne, NE 68787	Kelby Herman
					x		Rebuilding Together Omaha	4221 N 164th St Omaha, NE 68116	Tom Pettigrew
				x			ShotgunHaus Designers	3910 Miami St, Omaha, NE 68111	Linda Williams
x		x					Think Green Consulting (TGC)	1023 Lincoln Mall, Ste 201, Lincoln, NE 68508	Trent P Anderson; Heather Hudson
x		x		x	x		WasteCap of Nebraska	285 S 68th Street, Pl #540,Lincoln, NE 68510	Carrie Hakencamp
x					x		Weatherization Trust, Inc.	2915 N 16th St, Omaha, NE 68110	Sean Haire

Appendix B: Grassroots Organizations

Omaha

Omaha Schools			
Apollo's Preparatory School	3223 N 45th St	**Jesuit Middle School**	2311 N 22nd St
Benson Magnet High	5120 Maple St	**Kellom Elementary School**	1311 N 24th St
Bethany Lutheran Church Preschool	5151 Northwest Radial Highway	**Kennedy Elementary School**	2906 North 30th St
Central High School	124 N 20th St	**King Elementary School**	3706 Maple St
Central Park Elementary	4904 N 42nd St	**King Science/Tech Magnet Middle School**	3720 Florence Blvd
Clarkson College	101 S 42nd St	**Liberty Elementary School**	2021 St. Mary's Ave
Conestoga Magnet Center	2115 Burdette St	**Lothrop Magnet Elementary**	3300 North 22nd St
Conestoga Magnet Elementary School	2115 Burdette St	**Mercy High School**	1501 S 48th St
Creighton University	2500 California Plaza	**Monroe Middle School**	5105 Bedford Ave
Druid Hill Elementary	4020 North 30th St	**Nova Alternative School**	3483 Larimore Ave
Duchesne Academy of the Sacred Heart	3601 Burt St	**Omaha Public Schools**	3215 Cuming St
Educare At Blackburn	2606 Hamilton St	**Sacred Heart Elementary School**	2205 Binney St
Field Club Elementary School	3512 Walnut St	**Saratoga Elementary School**	2504 Meredith Ave
Fontenelle Elementary School	3905 N 52nd St	**Skinner Magnet Center School**	4304 North 33rd St
Franklin Elementary School	3506 Franklin St	**St. Cecila Cathedral Grade School**	3869 Webster St
Girls Inc. of Omaha	2811 North 45th St	**St. Paul Lutheran School**	5020 Grand Ave
Holy Cross Middle School	1502 S 48th St	**University of Nebraska Medical Center**	42nd and Emile
Holy Name School	2901 Fontenelle Blvd	**Walnut Hill Elementary School**	4355 Charles St
Jackson Elementary School	620 S 31st St		

Omaha Religious Institutions			
Afresh Anointing Church	4757 N 24th St	**King Solomon Baptist Church**	3211 Pinkney St
Antioch Church of God in Christ	3654 Miami St	**Kountze Memorial Lutheran Church**	2650 Farnam St
Augustana Lutheran Church	3647 Lafayette Ave	**Lighthouse United Pentecostal**	3402 Burt St
Bethany Lutheran Church	5151 Northwest Radial Highway	**Love Deliverance Temple**	3036 Bedford Ave
Bethel Lutheran Church	1312 S 45th St	**Morning Star Baptist Church**	2019 Burdette St
Bethesda Temple Seventh Day	3725 Ames Ave	**Mt. Calvary Lutheran Church**	5529 Leavenworth St
Bethlehem Baptist Church	2118 Browne St	**Mt. Moriah Baptist Church**	2602 N 24th St
Cathedral of Love Church	2816 Ames Ave	**Mt. Nebo Baptist Church**	5501 North 50th St
Chosen Stones-Living Faith Church	2724 N 24th St	**Mt. Sinai Baptist Church**	4504 Bedford Ave
Christ Temple Church of Christ Holiness	2124 N 26th St	**New Beginning Community Baptist Church**	3332 Seward St
Christian Discipleship Church	1823 Lake St	**New Beginning Community Baptist Church**	3332 Seward St
Christ-Love Unity Church	2903 Ellison Ave	**New Beginnings in Christ**	P.O. Box 6323
Church of God in Christ	4628 Grand Ave	**New Bethel Church of God**	1710 N 25th St
Church of the Living God	2029 Binney St	**New Life Presbyterian Church**	4060 Pratt St

Omaha Religious Institutions			
Cleaves Temple Christian Methodist Episcopal Church	2431 Decatur St	**New Light Baptist Church**	4011 Maple St
Community of Christ Central Congregation	3524 Burt St	**Paradise Baptist Church**	2124 Lothrop St
Community of Christ Church	3524 Burt St	**Pella Lutheran Church**	303 S 41st St
Covenant Life Fellowship	1310 N 29th St	**Pilgrim Baptist Church**	2501 Hamilton St
Deliverance Church of God In Christ	5024 Northwest Radial Highway	**Pilgrim Baptist Church**	2501 Hamilton St
Ebenezer Baptist Church	2221 Fowler Ave	**Pleasant Green Baptist Church**	2002 Willis Ave
Eden Baptist Church	4023 North 29th St	**Risen Son Baptist**	4932 Ohio St
Faith Bible Church	1555 S 27th St	**Robinson Memorial Church**	2318 N 26th St
Faith Temple Church of God in Christ	2108 Emmet St	**Salem Baptist Church**	3131 Lake St
First Baptist Church ABC	421 Park Ave	**Scottish Rite Masonic Center**	202 S 20th St
First Central Congregational Church	421 S 36th St	**Second Advent Church of God in Christ**	5960 N 30th St
First Central Congregational Church	421 S 36th St	**Sharon Seventh Day Adventist Church**	3336 Lake St
First Lutheran Church	542 S 31st St	**Spirit and Truth Gospel Church**	2845 Ames Ave
First Presbyterian Church	216 S 34th St	**St. Barnabas Church**	P.O. Box 31155
First Unitarian Church	3114 Harney St	**St. Benedict the Moor Church**	2423 Grant St
Freedom Assembly of God	3025 Parker St	**St. Cecilia's Cathedral**	701 N 40th St
Freedom Assembly of God	4224 N 24th St	**St. John African Methodist Episcopal Church**	2402 N 22nd St
Freestone Primitive Baptist	4023 Ames Ave	**St. John the Baptist Greek Church**	602 Park Ave
Gethsemane Missionary Baptist Church	4102 Florence Blvd	**St. John's Catholic Church**	2500 California Plz
Good Shepherd Lutheran	5071 Center St	**St. Mark Baptist Church**	3616 Spaulding St
Grace Apostolic Church	2216 Military Ave	**St. Mary Magdalene Catholic Church**	109 S 19th St
Grace Evangelical Lutheran Church	1326 S 26th St	**St. Matthew Missionary Baptist Church**	1001 N 30th St
Grace Tabernacle	1801 Cuming St	**St. Matthew's Baptist Church**	1001 N 30th St
Greater Beth-El Temple	2316 N 25th St	**St. Paul Lutheran Church**	5020 Grand Ave
Greater Macedonia Baptist Church	3026 Hamilton St	**St. Peter Catholic Church**	2706 Leavenworth St
Greater New Hope Baptist Church	1411 N 30th St	**St. Peter's Catholic Church**	709 S 28th St
Gregg Memorial African Methodist Episcopal Church	1322 N 45th St	**St. Vincent of Lerins Orthodox Church**	2502 N 51st St
Harvest Community Church	3903 Cuming St	**Sudanese-American Presbyterian Church**	2301 N 45th St
Holy Cross Catholic	4810 Woolworth St	**Templo Del Dios Viviente**	2543 N 16th St
Holy Family Church	1715 Izard St	**The North 24th Street Church of God (The Worship Center)**	2021 N 24th St
Holy Name Catholic Church	2901 Fontenelle Blvd	**Trinity Cathedral**	109 N 18th St
Hope & Refuge Ministries (Church of God in Christ)	3723 N 37th St	**Trinity Hope Foursquare Church**	4030 Redman Circle
Immanuel Community Church	2761 Lake St	**True Vine Baptist Church**	5001 North 42nd St
Inspirational Church	4248 Lake St	**Union Community Holy Spirit Church**	3022 Cuming St

Omaha Neighborhoods			
Bemis Park Neighborhood Association	1041 N 34th St	**Long School Neighborhood Association**	2622 Franklin St
Blackstone Neighborhood Association	3607 Jackson St	**Midtown Neighborhood Alliance**	1041 N 34th St
Columbus Park Neighborhood Association	2221 Mason St	**North Downtown Alliance**	1516 Cuming St
Concord Square Homeowners Association	2104 Franklin St	**North Gold Coast Historic Neighborhood Association**	415 N 38th St
Conestoga Place Neighborhood Association	2092 Parker Cir	**OIC Neighborhood Association**	2533 Binney St
Erskine Park Neighborhood Association	2006 N 37th St	**Orchard Hill Neighborhood Association**	4518 Hamilton St
Gifford Park Neighborhood Association	152 N 35th St	**Original Montclair Neighborhood Association**	PO Box 31611
Highlander Neighborhood Association	PO Box 11599	**Park East Neighborhood Association**	2600 Farnam St
Joslyn Castle Neighborhood Association	PO Box 31764	**Prospect Place Neighborhood Association**	3103 Decatur St
Kountze Park Neighborhood Association	1818 Pinkney St	**Triple One Neighborhood Association and Parents Union**	2866 Binney St
Leavenworth Neighborhood Association	1029 S 35th Ave	**Long School Neighborhood Association**	2622 Franklin St

Omaha Community Gathering Places			
AV Sorensen Community Center	4808 Cass St	**Loves Jazz & Art Studio**	2510 North 24th St
Bingle Senior Citizen Center	3612 Cuming St	**Micklin Lumber**	1020 N 19th St
Butler-Gast YMCA	3501 Ames Ave	**Midtown Business Association**	3500 Farnam St
Catholic Charities	2417 Burdette St	**North Omaha Youth Club**	423 N 40th St
Charles B. Washington Branch Library	2868 Ames Ave	**North Senior Center**	2415 Grant St
Creighton University Lied Art Gallery	2500 California Plz	**Omaha Children's Museum**	500 S 20th St
Downtown Boxing Club	312 S 24th St	**Omaha Community Foundation**	302 S 36th St
Downtown Omaha Business Association	1905 Harney St	**Pleasantview East/West Study Center**	2910 Parker St
Downtown YMCA	430 S 20th St	**Reinert-Alumni Memorial Library**	2500 California Plz
Field Club of Omaha	3615 Woolworth Ave	**Shelterbelt Theater**	3225 California St
Florence Branch Library	2920 Bondesson St	**Southern Sudan Community Association**	3610 Dodge St
Gallery 72	2709 Leavenworth St	**St. Cecilia Cathedral Cultural Center and Gallery**	701 N 40th St
Gerald R. Ford Conservation Center	1326 S 32 St	**St. Mary Magdalene Senior Center**	1817 Dodge St
Greater Omaha Young Professionals	1301 Harney St	**The Hope Center**	2209 N 20th St
Jefferson Square Business Association	2000 Cuming St	**United Methodist Community Center**	2001 N 35th St
Joslyn Art Museum	2200 Dodge St	**Veteran Affairs**	4101 Woolworth St
Josyln Castle	3902 Davenport St	**W. Dale Clark Branch Library**	215 S 15th St

Lincoln

Lincoln Schools			
Behavioral Skills Program	340 N 56th St	**Irving Middle School**	2745 S 22nd St
Clinton Elementary School	1520 N 29th St	**Lefler Middle School**	1100 S 48th St
East High School	1000 S 70th St	**Lincoln High School**	2229 J St
Elliott Elementary School	225 S 25th St	**North Star High School**	5801 N 33rd St
Everett Elementary School	1123 C St	**Prescott Elementary School**	1930 S 20th St
Goodrich at Dawes Middle School	5130 Colfax Ave	**Randolph Elementary School**	1024 S 37th St
Hartley Elementary School	730 N 33rd St	**Saratoga Elementary School**	2215 S 13th St
Huntington Elementary School	2900 N 46th St		

Lincoln Religious Institutions			
7th Day Adventist Church	1640 A St	**Lincoln Baptist Church**	1205 F St
Angelic Temple Church of God	300 N 33rd St	**Lincoln Wesleyan Church**	130 S 46th St
Calvary United Methodist Church	1610 S 11th St	**Mount Zion Baptist Church**	3301 N 56th ST
Catholic Hispanic Community Church	3130 S St	**Newman United Methodist Church**	2242 R St
Celebration Anglican Church	2137 R Street	**Our Saviors Lutheran Church**	1200 S 40th St
Central Christian of the Missionary Alliance Church	2820 O St	**Piedmont Park Community Church - 7th Day Adventist Church**	4801 A St
Christ Temple Church	2510 S Street	**Praise Temple - The Living God**	130 S 46th St
Christ United Methodist Church	4530 A St	**Quinn Chapel African Methodist Episcopal Church**	1225 S 9th St
Christ Unity Church	135 N 31st St	**Sacred Heart Catholic Church**	3128 S St
Christo Rey Church	4221 J St	**Saint John of Kronstadt Eastern Orthodox Church**	2800 Holdrege St
Church on the Rock	2200 Y St	**South Street Temple**	2061 S 20th St
Cross Roads Community Church	4401 N 40th St	**Southview Christian Church**	2040 S 22nd St
First Plymouth Congregational Church	2000 D St	**St. Francis of Assisi Church**	1145 South St
First Presbyterian Church	840 S 17th St	**St. Paul United Church**	1302 F St
First United Methodist Church	2723 N 50th St	**Temple Baptist Church**	4940 Randolph St
Fourth Presbyterian Church	5200 Francis St	**Trinity Lutheran Church**	724 S 12th St
Friedens Lutheran Church	540 D St	**Trinity United Methodist Church**	1345 S 16th St
Grace Lincoln United Methodist Church	2640 R Street	**Victory Fellowship Church**	1235 N 69th St
Grace Lutheran Church	2225 Washington St	**Way of Holiness Church**	2741 N 41st St
Harvest Community Church	407 N 26th St	**Westminster Presbyterian Church**	2110 Sheridan Blvd
Hope Reformed Church	4221 J St	**Zion Restoration Ministries**	4444 O St
Immanuel Evangelical Lutheran Church	2001 S 11th St		

Lincoln Neighborhoods			
Antelope Park Neighborhood Association	3035 Franklin St	**Mayor's Neighborhood Roundtable**	555 South 10th St
Everett Neighborhood Association	P.O. Box 81044	**Near South Neighborhood Association**	2202 Washington St
Hartley Neighborhood Association	834 Elmwood Ave	**Witherbee Neighborhood Association**	389 S 47th
Lincoln Neighborhood Alliance	341 S. 52nd St	**Woods Park Neighborhood Association**	339 S 29th St

Lincoln Community Gathering Places			
Auld Recreation Center	3140 Sumner St	**Nebraska Family Council**	1106 E St
City Impact Center	400 N 27th St	**People's Health Center**	1021 N 29th St
F St. Recreation Center	1225 F St	**South Branch Library**	2675 South St
Good Neighbor Community Center	2617 Y St	**St. Vincent De Paul Society**	1911 R St
Lincoln Children's Museum	1420 P St	**YMCA**	2255 S 25th St
Love Library	1400 R Street	**Meadowlark Coffee**	1624 South St
Lutheran Family Services	2222 S 16th St	**Straw, Sticks and Bricks**	720 O St, Ste B
Malone Community Center	2032 U St		

Appendix C: Elected Officials and Nonprofits

Omaha

Omaha Elected Officials			
Brenda Council, State Senator	P.O. Box 94604, State Capitol, Room 1120	**Jeremy Nordquist, State Senator**	P.O. Box 94604, State Capitol, Room 2004
Ben Nelson, US Senator	11819 Miracle Hills Dr, Ste 205	**Lee Terry, Congressional District 2**	11717 Burt St, #106
Ben Gray, City Council	1819 Farnam St, LC1	**Mike Boyle, Douglas County Commissioner**	1819 Farnam St, LC2, Civic Center
Chris Jerram, City Council	1819 Farnam St, LC1	**Mike Johanns, US Senator**	9900 Nicholas St, Ste 325
Chris Rodgers, Douglas County Commissioner	1819 Farnam St, LC2, Civic Center	**Pete Festersen, City Council**	1819 Farnam St, LC1
Gwen Howard, State Senator	P.O. Box 94604, State Capitol, Room 1124	**Garry Gernandt, City Council**	1819 Farnam St, LC1
Heath Mello, State Senator	P.O. Box 94604, State Capitol, Room 1206	**Jean Stothert, City Council**	1819 Farnam St, LC1
Franklin Thompson, City Council	1819 Farnam St, LC1	**Thomas Mulligan, City Council**	1819 Farnam St, LC1
Jim Suttle, Mayor	1819 Farnam St, Ste 300		

Omaha Nonprofit Organizations			
2020 Omaha	106 S 89th St	**Live Well Omaha Kids**	12565 W Center Rd, #220
Activate Omaha	12565 West Center Road, #220	**Metro Area Transit**	2222 Cuming St
Benson-Ames Alliance	6001 Dodge St	**Midtown Business Association**	
Downtown Omaha, Inc.	1905 Harney St, #610	**Nebraska Cultural Endowment**	1004 Farnam St, Plaza Level
Downtown Omaha Business Association	P.O. Box 8733	**North Omaha Development Project**	1301 Harney St
Greater Omaha Convention and Visitors Bureau	1001 Farnam St	**Omaha by Design**	6001 Dodge St
Jefferson Square Business Association	2000 Cuming St	**Omaha Community Foundation**	302 S 36th St, # 100
Joslyn Castle Trust	3902 Davenport St	**Omaha Downtown Improvement District Association**	1620 Dodge St
Keep Omaha Beautiful, Inc.	1819 Farnam St, #306	**Omaha Public Art Commission**	1819 Farnam St
Landmarks Heritage Preservation Commission	1819 Farnam St, #1100	**Papio-Missouri River Natural Resources District**	8901 S 154th St
Landmarks, Inc.	3838 Davenport St	**Restore Omaha**	9312 Leavenworth St
Live Well Omaha	12565 W Center Rd, #220		

Lincoln

Lincoln Elected Officials			
Amanda McGill, State Senator	P.O. Box 94604, State Capitol, Room 1212	**Jonathan Cook, City Council**	555 S 10th St, Room 111
Bill Avery, State Senator	P.O. Box 94604, State Capitol, Room 1114	**Ken Haar, State Senator**	P.O. Box 94604, State Capitol, Room 1017
Colby Coash, State Senator	P.O. Box 94604, State Capitol, Room 1117	**Larry Hudkins, Lancaster County Board**	8600 NW 112th St
Danielle Conrad, State Senator	P.O. Box 94604, State Capitol, Room 1008	**Ray Stevens, Lancaster County Board**	3411 Hanson Ct
Dave Heineman, Governor	P.O. Box 94848	**Tony Fulton, State Senator**	P.O. Box 94604, State Capitol, Room 2107
Jeff Fortenberry, Congressional District 1	301 S 13th St, #100	**Mayor Chris Beutler**	555 S 10th St., Ste 301
John Spatz, City Council	555 S 10th St, Room 111	**Doug Emery, City Council**	6900 Morrill Ave
Jon Camp, City Council	PO Box 82307	**Eugene Carroll, City Council**	555 S 10th St, Room 111
Adam Hornung, City Council	555 S 10th St, Room 111	**Jayne Snyder, City Council**	555 S 10th St, Room 111

Lincoln Nonprofit Organizations			
AIA Nebraska (Lincoln Chapter)	P. O. Box 80045	**Nebraska Center for Sustainable Construction**	Email Only
B&J Partnership	340 Victory Lane	**Nebraska League of Conservation Voters**	215 Centennial Mall St, #509
Community Crops	1551 S 2nd St	**Nebraska Renewable Energy**	708 N Davis Ave
Heritage Nebraska	P.O. Box 22608	**OneCert – Organic Certification**	427 N 33rd St
Lincoln Green Building Group	Email Only	**ReBuild Associates**	2110 S 33rd St
Lincoln Green Scene	Email Only	**Sierra Club Nebraska**	P.O. Box 4664
Lower Platte South Natural Resource District	PO Box 83581	**US Nebraska Flatwater Chapter, USGBC**	PO Box 3543

Appendix D: Brand Book

Brand Overview

Brand Archetype:

Primary: The Caregiver
Supporter/advisor, Advocate, Nurturer, Service provider, Altruist

Secondary: The Sage
Expert/guru, Philosopher/contemplative, Mentor/teacher, Investigator, Analyst

Brand Promises:

reEnergize makes things easier.

reEnergize will make me more comfortable.

reEnergize looks out for my best interest.
(my bottom line, my home, my comunity)

reEnergize cares about making a difference in my community and the world.

reEnergize is resource for knowledge on sustainable buildings.

Audiences:

Primary:
- home owners
- business owners
- landlords

Secondary:
- general public
- other communities

Name

"reEnergize"
reEnergize is the proper name of the program. The "re" should always appear in lowercase and "Energize" should always be in capitalized. There is never a space between "re" and "Energize."

"reEnergize *{Location}*"
The location of the program should be added to the program name when referencing a program specific to a location. This is to give the community ownership over the program.
IE: *reEnergize Omaha* or *reEnergize Lincoln*.

"reEnergize Program"
When referencing the general program, it should be referred to as *reEnergize* or *reEnergize Program*.

Other variations
The name of the program should **never** be written as:
re Energize, Reenergize, REenergize, (re)Energize, re:Energize or any other variation of capitalization or punctuation.

Domain names
It is recommended the domain name be written in camelcase for readability and never with "www." The program domain name is: *reEnergizeProgram.org*. Location domain names are as follows: *reEnergizeOmaha.org* and *reEnergizeLincoln.org*.

Logo

There are a variety of logo layouts for practically every use. Please use only logo only as displayed below.

Full lock up (vertical)
knot, type, tagline:

Full lock up (horizontal)
knot, type, tagline:

Logo (vertical)
knot, type:

Logo (horizontal)
knot, type:

Logo

Below are the logo elements (type and knot). The elements may be used in full color or a single non-brand color, but never multiple non-brand colors.

Type:

Knot:

Type:
(one color)

Knot:
(one color)

Type:
(reverse color)

Knot:
(reverse color)

Logo

Logo Clearance

White space is an important part of maintaining an overall clean look and feel. It is important to have enough clearance around the logo. Allow at least one "loop"-length between the logo and other graphical elements.

Clearance on vertical logo:

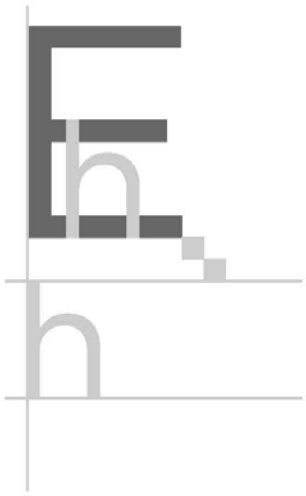
Clearance on horizontal logo:

Logo

Location Specific Logo

The location name on the location specific logo should be left aligned with the capital "E" of *reEnergize*. The vertical margin is twice the stroke width of the capital "E." The tagline should not be used along with the location specific logo.

Location specific logo spacing

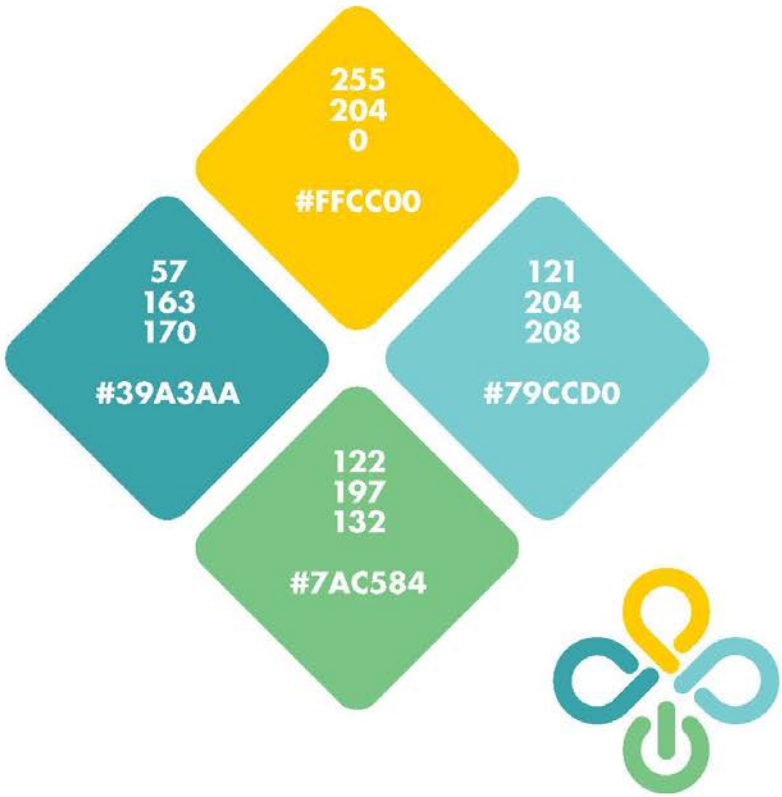


reEnergize Omaha

reEnergize Lincoln

Colors

Below are the RGB and HEX values of the color scheme.



Fonts

Logo and Headlines

The font used in the logo and tagline is Gotham Book. This font can also be used for headlines.

Gotham
abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ

Body Copy

Body copy should be set in Helvetica. Arial is a suitable substitute when Helvetica is not available in cases of project documents, Power Point presentations and web use. For all other public-facing marketing pieces Helvetica should be used.

Helvetica
abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ

Supporting Graphics

Informational Graphics

Informational graphics are an important communication aspect to the reEnergize brand. All graphics intended to represent reEnergize should fit into the reEnergize brand look and feel. The graphics will be recognized by their simple bold look, thick curvy and rounded shapes and bright brand color scheme. Stock "clip art" should never be used on public-facing branded materials.

Using "re"

The use of the *"re"* mark and *"re"* in written form are powerful brand elements. It is important this element is not used excessively in order to maintain the brand integrity and the *"re"* strength.

When using *"re"* in graphic or written form it must pass these guidelines:

- The word has a positive connotation with or without the *"re"*
- The word must hold up on its own without the word *"re"*
- The *"re"* must be lowercase and the word must be capitalized

Good examples: reThink, reInvest, reWork
Bad examples: reTrofit, reBate, reason, result

Brand Book

This brand book was prepared for reEngergize by What Cheer, Inc. If you have questions regarding usage or need graphic resources, please contact What Cheer.

questions@what-cheer.com
(402) 577-0688

What Cheer, Inc.
1111 N 13th Street #106
Omaha, NE 68102

Demographic Study for the reEnergize Program

August 2012

Bozell and Jacobs

Group B Upscale America

Salvatore and Joanne

Type B03 Urban Commuter Families

Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe

6.33%

Overview

Rankings
Age Rank 56/60
Wealth Rank 15/60

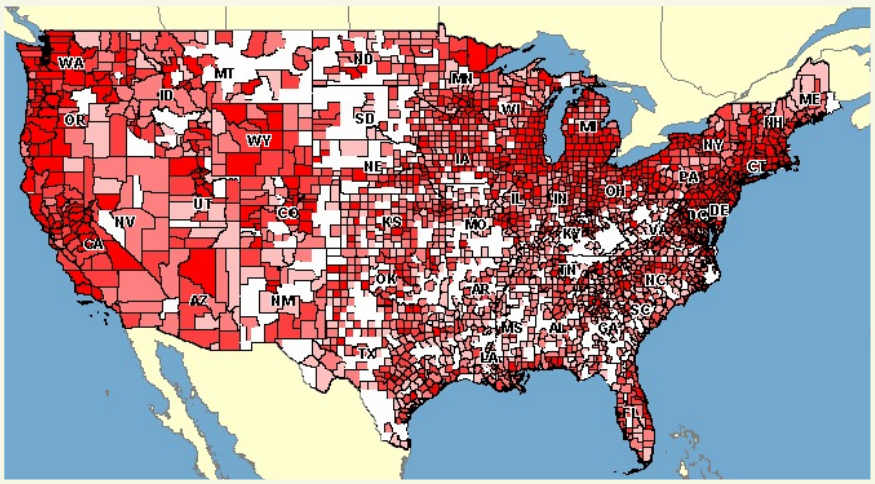
Top Markets
New York
Chicago
Philadelphia
Boston
Los Angeles

Top Internet Sites
www.drudgereport.com
www.cars.com
www.disney.com
moneycentral.msn.com
www.autotrader.com

Preferred Cars
Chrysler Town & Country
GMC Envoy
Saturn L-Series
Saturn Vue
Toyota Avalon

Locations

Key
- High
- Above Average
- Average
- Below Average
- Low



Contents

Group B Upscale America

Salvatore and Joanne

Type B03 Urban Commuter Families

Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe

6.33%

Description

Demographics

Not all families have fled the nation's cities for the far-out suburbs. In Urban Commuter Families, Baby Boomer families and couples are content to live in comfortable, single detached homes in city neighborhoods on the metro fringe. Many of these upscale, college-educated households contain dual-income couples who put in long hours as professionals and managers in retail, health care and education services. They tend to leverage their home equity with major home improvement projects, and build their real estate holdings with recent purchases of second homes for family getaways.

Lifestyles

With its concentration of empty-nesters, Urban Commuter Families lifestyle is relatively serene. They are not into aerobic sports, preferring to get their exercise from low-impact activities such as gardening, golfing and bird-watching. They enjoy leisure activities like going to the theater or antique show rather than a rock concert or an auto race. They describe themselves as brand-loyal shoppers who prefer to buy functional clothes over expensive designer labels, shopping at stores like Sears and J.C. Penney. With limited interest in the latest electronics and technology products, their homes are more likely to contain stereos and 35-mm cameras than MP3 players and digital cameras. These conservative investors put their money to work in CDs, U.S. savings bonds and tax-sheltered annuities. With their high rates of owning houses and vacation homes, they take out home improvement loans and spend their free time roaming the aisles at Home Depot and Lowe's, Linens 'N Things and Pottery Barn.

Media

The households in Urban Commuter Families are old-fashioned media fans. They subscribe to daily newspapers at high rates and spend their Sunday mornings poring over the travel section and the ad inserts. They pick up traditional general interest magazines at the supermarket, enjoying Reader's Digest, Family Circle and Good Housekeeping. On their commute to work, they listen to the calming strains of classical, golden oldies and big band music on the radio. When they finally wind down in front of a TV, these conservative households watch Fox News, the History Channel and the old movies on AMC and TMC. Their Mosaic motto could be "No surprises, please."

Group B Upscale America

Salvatore and Joanne

Type B03 Urban Commuter Families

Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe

6.33%

Who We Are

Demographics

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*

Example Index — *Example* Mean % 11.11 (0 50 100 150 200)

Gender

Male	74.00
Female	26.00

Age

18 - 24	0.69
25 - 34	1.42
35 - 44	7.35
45 - 54	21.87
55 - 64	28.80 (206)
65 - 74	20.25 (276)
75+	19.62 (276)

Marital Status

Married	77.61
Single - never married	0.20
Single - other	22.19

Number in Household

1 person	12.00
2 person	50.00
3 person	21.00
4 person	11.00
5+ person	5.11

Household Composition

Married, no children	59.00
Married, dependent children	19.00
Lone parent with children	3.48
1 dependent child	9.20
2+ dependent children	13.00

Age of Children

0 - 3	2.88
4 - 6	2.79
7 - 9	3.37
10 - 12	3.43
13 - 17	6.90

0 50 100 150 200

Length of Residence

1 year and less	0.89
2 - 5	4.74
6 - 10	11.26
11 - 14	19.86
15+	63.25 (410)

General Race

Asian, Pacific Islander	1.26
Black or African American	2.96
White	94.00
Not White or Black	3.07
Other race	1.81

Hispanic Race

Hispanic and White	2.68
Hisp. & Black African American	0.09
Hisp. & not White or Black	1.01
Hispanic born in US	2.33
Hispanic not born in US	0.70
Hispanic (HOH) born in US	3.31
Hispanic (HOH) not born in US	0.53

Religion

Christian	82.00
Jewish	1.83
Other	2.67
No religious preference	12.00

Education

Level of Education

Below high school diploma	7.85
High school diploma	36.00
Some college	21.00
Bachelors degree	15.00
Graduate degree	9.44

0 50 100 150 200

mosaic USA
experian

Group B Upscale America

Salvatore and Joanne

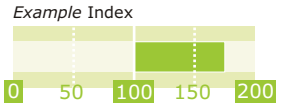
Type B03 Urban Commuter Families

Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe

6.33%

How We Make a Living

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*



Work

General

Full time	44.00
Part time	11.00
Females over 30 hours	18.00
Males over 51 hours	3.39
Not employed	45.00
Temporarily unemployed	2.85
Work at home	1.07
Looking after home	6.51
Retired	32.00
Full time student	1.07
Self-employed	6.00
Never worked	0.45

Occupation

Top management	5.34
Professional and technical	23.00
Sales and service	15.00
Farm related	0.20
Blue-collar	3.29
Other	15.00

Industry

Agriculture/forestry/fishing	0.79
Mining and construction	2.58
Manufacturing	3.90
Transport, comms, utilities	3.09
Wholesale and retail trade	9.32
Real estate, rental, leasing	1.20
Other services	5.99
Public admin/active military	3.75
Educational services	6.65
Health care, social services	5.32
Information	0.82
Finance and insurance	3.20
Professional/scientific/tech	4.07
Management/admin/waste	0.94
Accommodation/food	2.51
Arts/entertainment	1.14

0 50 100 150 200

Income

Household Income

Under $15,000	6.63
$15,000 - $24,999	8.56
$25,000 - $34,999	9.23
$35,000 - $49,999	15.68
$50,000 - $74,999	23.29
$75,000 - $99,999	16.63
$100,000 - $149,999	14.23
$150,000 - $249,999	3.64
$250,000+	2.10

Handling Money

Banking

Checking account	69.00
Savings account(s)	58.00
Savings Certificates Cd (Long Term)	19.00
Savings Certificates Cd (Short Term)	9.05
Cash management accounts	4.96
Check guarantee card	3.48
Debit card, EFT	24.00
Internet banking	22.00
ATM card	61.00

Credit Cards

Usually pay in full	42.00
Usually pay in part	19.00
Usually pay minimum	2.61
Have store card	45.00

Loans

Secured line of credit	4.27
Unsecured line of credit	2.03
Auto loan (new or used)	29.00
Home improvement loan	3.18
Home mortgage loan	27.00
Personal loan	6.77

0 50 100 150 200

Group B Upscale America

Salvatore and Joanne

Type B03 Urban Commuter Families

Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe

6.33%

How We Make a Living

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*

Example Index — *Example* Mean % 11.11

0 50 100 150 200

Handling Money

Savings & Investments

Bonds	23.00
Stocks	22.00
College savings	3.08
Money market	21.00
Mutual funds	28.00
Tax shelters	9.26
Online trading	1.76
401K	23.00
IRA	29.00
Investment in collectibles	3.52
International investments	1.71
KEOGH, SEP-IRA, PENSION	7.12

Shareholdings

High value (over $50,000)	5.06
Low value (under $50,000)	14.00

0 50 100 150 200

Medical Insurance

Company	57.00
Private	18.00
Medicare, Medicaid, Medigap Memebership	23.00

Life Insurance

Have life insurance	69.00
Over $500,000	2.36
$200,000 - $499,999	7.63
$100,000 - $199,999	13.00
$50,000 - $99,999	12.00
$20,000 - $49,999	11.00
Less than $20,000	17.00
Group life	15.00
Individual annuity	6.24
Term life	31.00
Whole, universal, variable (cash value)	27.00

0 50 100 150 200

Where We Live

Type of Property

Multiple family dwellings	0.22
Single family dwellings	99.78

Property Value

Under $50,000	1.46
$50,000 - $74,999	2.61
$75,000 - $99,999	5.75
$100,000 - $149,999	21.00
$150,000 - $199,999	18.00
$200,000 - $299,999	24.00
$300,000 - $499,999	17.00
$500,000 - $749,999	4.27
Over $750,000	1.52

0 50 100 150 200

Home Ownership

Home owner	99.78
Renter	0.21
Home improvement loans	3.18
Home mortgage (1st)	27.00
Home equity loan	16.00

Insurance

Homeowner's insurance	78.00

0 50 100 150 200

Group B Upscale America

Salvatore and Joanne

Type B03 Urban Commuter Families

Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe

6.33%

Our Home Lives

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*

Example Index — *Example* Mean % 11.11

0 50 100 150 200

Car Ownership

Number of Cars

1 car per household	19.00
2 cars per household	42.00
3+ cars per household	36.00

Types of Car

New vehicle	42.84
Used vehicle	57.16
Leased vehicle	5.42
Alternative power	0.13
Mid range	26.94
Mid range premium	3.21
Pickup	16.42
Small	10.38
Sports	4.26
Sports wagon	2.77
Sports wagon premium	0.48
SUV large	3.03
SUV medium	8.84
SUV premium	0.25
Traditional	5.07
Upscale and luxury	9.14
Full size van	2.13
Mini van	6.95

Insurance

Auto insurance	89.00

Pets

Have a dog	36.00
Have a cat	28.00
Have a dog or cat	52.00

0 50 100 150 200

Travel and Vacations

General

Internet used last month	24.00
Cruise last 3 years	16.00
Foreign travel last 3 years	43.00

In Last Year

6+ domestic trips	15.00
6+ domestic flights (business)	0.92
6+ domestic flights (personal)	1.70
$1,000+ on domestic trip	14.00
6+ nights in hotel (business)	5.61
6+ nights in hotel (personal)	22.00
Water sports/beach activities	3.71

Collectibles

Porcelain/crystal figurines	9.73
Die-cast/other miniatures	6.23
Disney/Warner/Hanna-Barbera	3.16
Coins (Numismatic)	11.00
Decorative plates	2.62
Collectible dolls	3.57
Ornaments	6.78
Paper collectibles	2.68
Sports memorabilia/cards	3.86
Stamps	3.09

Memberships

AARP	32.80
Art associations	4.63
Business clubs	2.41
Civic clubs	3.01
Country clubs	2.30
PTA, Parents Association	3.67
Union	9.67
Veterans club	7.25

209

0 50 100 150 200

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0 50 100 150 200

Sports

Aerobics	12.00
Archery or target shooting	8.89
Auto racing or rallying	2.12
Backpacking, hiking	11.00
Baseball	6.87
Basketball	12.00
Bicycling	25.00
Billiards/pool	17.00
Bowling	18.00
Camping trips (overnight)	14.00
Fitness, walking, exercise	46.00
Fly fishing	20.00
Football	7.21
Golf	17.00
Hockey	3.26
Horseback riding	4.11
Hunting	7.47
Ice/in-line/roller skating	8.33
Jet ski, wave running/biking	3.29
Jogging, running	10.00
Martial arts, kickboxing	2.44
Motorcycling	6.79
Mountain/rock climbing	3.08
Power boating	8.89
Racquetball	2.96
Rowing	4.22
Sailing	2.59
Skateboarding	2.58
Skin diving or snorkeling	4.51
Snow boarding/mobiling	9.99
Soccer	4.89
Softball	6.75
Surfing, windsurfing	3.42
Swimming	34.00
Tennis	5.72
Using cardio machine	14.00
Volleyball	6.41
Water skiing	3.11
Weight training	17.00
Yoga	5.23

0 50 100 150 200

Entertainment and Leisure

Antique shopping/shows	21.00
Bars, nightclubs, dancing	19.00
Beach or lake	39.00
Board/card games	48.00
Bird watching	15.00
Buy books	61.00
Buy games and toys	48.00
Buy state lottery tickets	56.00
Casino and gambling	37.00
Comedy club	8.03
Concerts	31.00
Cooking for fun	32.00
Dance performance	9.24
Dining out (not fast food)	68.00
Education courses	14.00
Gardening	44.00
Go carting	2.44
Listen to music	69.00
Live theater	29.00
Member of CD/tape club	4.88
Movies (last 6 months)	67.00
Nascar racing	8.91
Needlework, quilting	13.00
Painting, drawing, sculpting	9.20
Photography	22.00
Play bingo	7.23
Play musical instrument	9.70
Read books	61.00
Read comics	9.63
Read gaming magazines	4.12
State fairs/zoo/museums	38.00
Theme parks	19.00
Woodwork, furniture	12.00

Home Entertainment

DVD players	77.00
MP3 players	5.90
Video games	18.00
Play, download online games	11.00
Satellite dish	22.00
Satellite radio	3.41

0 50 100 150 200

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Example Index — 0 50 100 150 200

Example Mean % 11.11

Computing and Internet

Personal computer	81.00
Laptop computer	15.40
Connected to Internet	49.00
Broadband access at home	6.90
E-mail in last month	56.00
PDA	6.73
Computer games	41.00

Internet Activity

High at home	11.00
Medium at home	13.00
Low at home	12.00
High at work	7.38
Medium at work	8.67
Low at work	8.84

Websites By Category

Auctions	9.73
Banking	22.30
Chat forums	2.89
Employment search	8.72
Financial information	10.20
Instant messaging	11.80
News, weather	29.50
Personal ads, dating	1.99
Online gambling	0.99
Electronic greetings cards	7.64
Shopping - gathering info	17.40
Sports	9.81
Yellow pages	10.50

Individual Websites*

geocities.yahoo.com
moneycentral.msn.com
www.amazon.com
www.aol.com
www.ask.com
www.autotrader.com
www.cars.com
www.cnn.com
www.disney.com

0 50 100 150 200

Individual Websites*

www.dogpile.com
www.drudgereport.com
www.ebay.com
www.eharmony.com
www.espn.com
www.etrade.com
www.expedia.com
www.foodnetwork.com
www.freecreditreport.com
www.google.com
www.hotmail.com
www.mapquest.com
www.marketwatch.com
www.monster.com
www.msn.com
www.msnbc.com
www.mtv.com
www.myspace.com
www.nascar.com
www.neopets.com
www.nick.com
www.netflix.com
www.nytimes.com
www.orbitz.com
www.overstock.com
www.partypoker.com
www.paypal.com
www.priceline.com
www.shopping.com
www.ticketmaster.com
www.travelocity.com
www.univision.com
www.usatoday.com
www.victoriassecret.com
www.walmart.com
www.weather.com
www.webmd.com
www.wwe.com
www.xanga.com
www.yahoo.com
www.yellowpages.com

0 50 100 150 200

* *Mean % is not available for individual websites*

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0 50 100 150 200

Telephones

International calls	13.00
Prepaid calling card	21.00

Cellular Phones

Have a cellular phone	69.00
Business	8.26
Personal	59.00
Analog mode	15.00
Call blocking	8.11
Call forwarding	18.00
Call waiting	30.00
Caller Id	42.00
Digital mode	21.00
Internet access	13.00
Nationwide coverage	25.00
Text messaging	27.00
Three way calling	15.00
Voice mail	48.00
Monthly bill $150+	3.16
Monthly bill $100 - $149	5.82
Monthly bill $50 - $99	24.00
Monthly bill under $50	33.00

Radio

High drive time	20.00
Medium drive time	21.00
Low drive time	18.00
High all day	20.00
Medium all day	21.00
Low all day	16.00
All news	27.60
All sports	5.78
Black rhythm and blues	0.27
Classic rock	9.01
Classical	5.93
Country (or Western)	17.20
Easy listening	7.04
Golden oldies	14.90
Jazz	5.25
Spanish	1.76
Urban contemporary	4.43
Mexican, Ranchera, Tejano	1.76

0 50 100 150 200

TV and Cable

High prime time	25.00
Medium prime time	20.00
Low prime time	16.00
High early and late fringe	24.00
Medium early and late fringe	20.00
Low early and late fringe	16.00
High all day	24.00
Medium all day	20.00
Low all day	15.00
High cable TV	21.00
Medium cable TV	23.00
Low cable TV	18.00

TV Primetime

Comedy and variety	15.90
News and documentary	36.20
Feature film	11.70
General drama	66.90
Nature	4.54
Reality	44.80
Science	5.94
Situation comedy	47.30
Sports	9.16
How-To	19.30

TV Daytime

Drama	11.80
News	24.70
Game show or contest	6.91
Talk or informational	8.82

TV Early Evening

Weekday news	42.60
Weekend news	29.90

TV Late Fringe

Monday - Friday	24.50
Weekend	12.40

0 50 100 150 200

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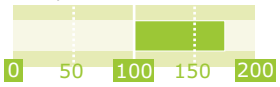
Example Index



Example Mean %
11.11

Magazines

High	24.00
Medium	21.00
Low	13.00
Airline, In Flight	5.77
Automotive	16.00
Black African American	3.16
Bridal	1.21
Business and finance	14.00
Child rearing, parenthood	19.00
Computers	6.13
Entertainment	41.00
Epicurean	11.00
Fishing/hunting/outdoor	15.00
General editorial	91.00
Health and fitness	25.00
Home and home services	71.00
Men's	22.00
Metropolitan/regional/state	12.00
Music	4.08
News	38.00
News weeklies	30.00
Photography	1.44
Science, technology	11.00
Special appeal	39.00
Sports	18.00
Teens	4.28
Travel	5.90
Women's	81.00
Women's beauty, grooming	8.42

Newspapers

New York Times	2.54
USA Today	3.68
Washington Post	1.60
Wall Street Journal	1.91

Last Part Read (Daily)

Business, finance	21.00
Classified	14.00
Comics	23.00
Editorial	24.00
Entertainment	21.00
Fashion	8.27
Food or cooking	18.00
Front page	46.00
General news	40.00
Home, furnishings, gardening	14.00
Movie listings and reviews	13.00
Science and technology	10.00
Sports	24.00
Travel	11.00
TV or radio listing	17.00

Last Part Read (Sunday)

Business, finance	19.00
Classified	15.00
Comics	24.00
Editorial	20.00
Entertainment	23.00
Fashion	8.13
Food or cooking	15.00
Front page	42.00
General news	35.00
Home, furnishings, gardening	15.00
Movie listings and reviews	15.00
Science and technology	10.00
Sports	23.00
Travel	16.00
TV or radio listing	18.00

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0 50 100 150 200

Shopping Habits

Stores Visited

Any convenience	53.00
Drug	80.00
Home electronics	32.00
Home furnishing/houseware	26.00
Home improvement	65.00
Office supply, computer	31.00
Shopping mall	62.00
Department/discount	58.00

Reason Store Visited

Price	72.00
Convenience	59.00

Frequency & Spend (Groceries)

10+ visits/month	44.00
4 - 9 visits/month	40.00
1 - 3 visits/month	8.40
$150+/week	14.00
$51 - $149/week	70.00
Less than $50/week	11.00

Customers refer to (non-food shopping)

Advertising on floor	45.00
Advertising on cart	9.07
Department signs, aisle	55.00
Lighted graphics	28.00
On the Internet	17.00
Radio, PA announcements	26.00
Signs on merchand racks	57.00
Store brochures, flyers	64.00

Customers refer to (food shopping)

Advertising on floor	54.00
Advertising on cart	12.00
Announcements in store	35.00
Computerized information	21.00
In-store demonstrations	38.00
In-store samples	47.00
On the Internet	8.70
Overhead aisle markers	51.00
Radio, PA announcements	22.00

0 50 100 150 200

Internet Order

Bought 6+ times	3.98
Bought 1-5 times	15.00
Spent $500+	11.00
Apparel, accessories	14.00
Automotive products	2.35
Banking services	3.72
Books, music, video	13.00
Collectibles	3.53
Computer products	7.17
Electronics, appliances	3.67
Food, perishables	2.05
Footwear	3.37
Gardening	1.49
Giftware	3.21
Home furnishings	3.72
Housewares	2.09
Office supplies	2.26
Prescriptions, health items	4.70
Sporting goods, equipment	3.81
Tickets for events (not movies)	5.24
Tickets for movies	2.46
Toys, games	4.25
Travel services, packages	6.06

Mail or Phone Order

Bought in last year	50.00
Spent $500+	7.78
Apparel, accessories	17.00
Books, music, video	6.73
Collectibles	3.76
Food, perishables	3.24
Footwear	5.10
Gardening	3.55
Giftware	4.15
Home furnishings	4.28
Housewares	4.06
Prescriptions, health items	9.68
Tickets for events (not movies)	2.94
Toys, games	3.11
Travel services, packages	2.04

0 50 100 150 200

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How We View The World

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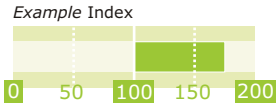
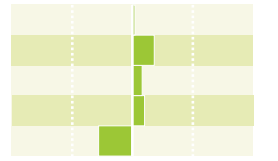
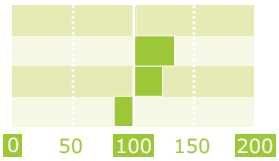


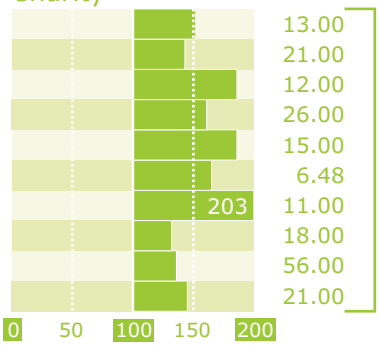
Political Outlook



Political Affiliation

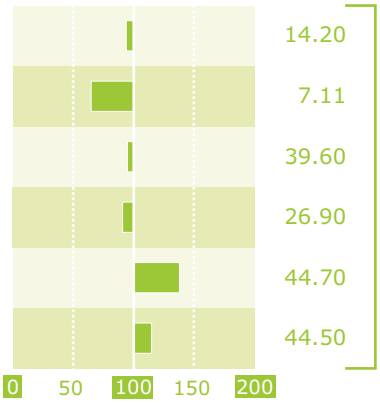


Charity

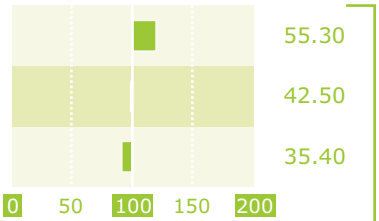


Attitudes

Cars



Travel



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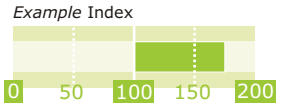
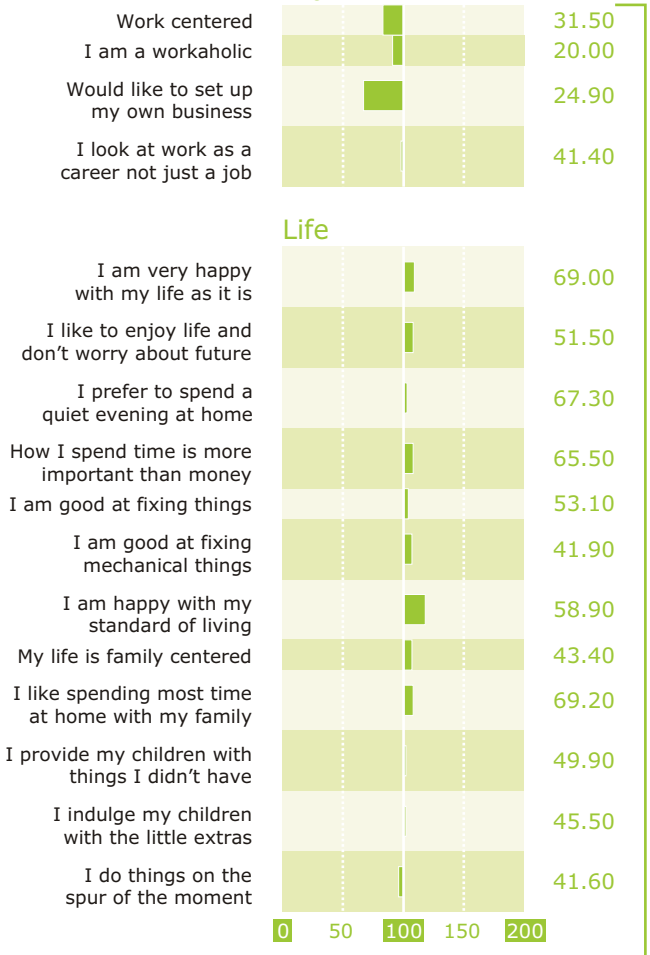
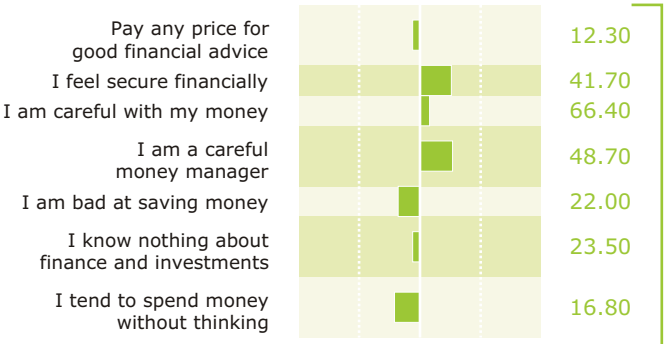


Work

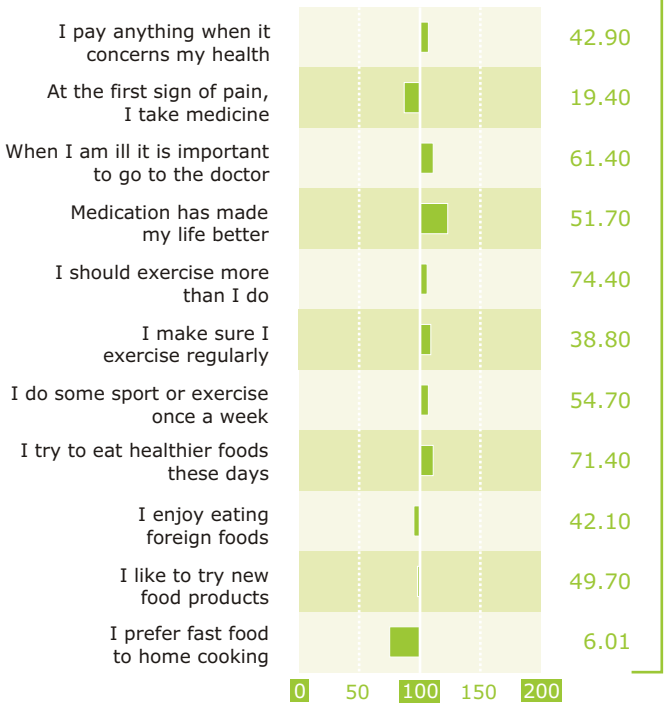


Life

Finance



Health and Food



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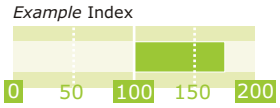


Internet

I like websites that protect my privacy	61.70
I get more of my news from the Internet	21.00
I do more shopping on the Internet than before	22.60
I like to hear about products/services by email	11.70

Computing/Electronics

Early adoptor	28.70
I love to buy new gadgets and appliances	22.40
I am first of friends to have electronic equipment	7.92
I pay anything for the electronic equipment I want	6.58
Tech shy	44.10
Computers confuse me, I'll never get used to them	30.80

TV

I find TV advertising interesting	24.80
I rely on TV to keep me informed	53.00
Typically, I avoid watching TV commercials	49.60
Advertising to children is wrong	49.60
Advertising a waste of time	27.90
I enjoy watching children's TV with my children	23.10

Newspapers

I rely on newspapers to keep me informed	52.50

0 50 100 150 200

Shopping

I only shop at my favorite stores - have brands I like	70.90
Normally, I only shop at nearby shops	58.60
I especially enjoy shopping with opposite sex	16.20
I use the Internet to help plan shopping trips	10.90
I wait for the sales	49.40
I shop for specials or bargains	60.30
I change brands often for variety and novelty	16.00
My children have a significant impact on brands	17.40
I am a child influenced shopper	28.10
I am an impulse shopper	38.50

Fashion

I have favorite clothing brands I stick with	56.80
I like to keep up with the latest fashions	22.40
Everything I wear is of the highest quality	32.30
I no longer wear clothes I wore a year ago	9.03

0 50 100 150 200

Supporting Notes

Mosaic USA is a lifestyle consumer segmentation system that classifies all U.S. households and neighborhoods into 60 unique Mosaic consumer segments and 12 lifestyle groupings that share similar demographic and socio-economic characteristics.

Mosaic is built using INSOURCE household level data and the wealth of Experian data assets. It utilizes more than 300 demographic variables including more than 70 INSOURCE household characteristics. Mosaic is linked to Experian's Simmons Market Research Bureau National Consumer Survey and other market research data providing insight into consumer purchasing behavior, media and channel preferences, opinions and attitudes.

Mosaic was developed on more than 20 years of segmentation development expertise from the global leader in segmentation systems. Experian has built more than 40 consumer segmentation systems around the globe and Mosaic is available in more than 25 countries. Mosaic USA is linked to a global segmentation network, providing the ability to extend your consumer targeting for international applications. Mosaic Global is based on the same premise of shared consumer patterns and classified into 10 distinct groups that are consistent across country borders.

Mosaic Portraits
These portraits have been designed to help users understand the essence of each of the sixty Mosaic types and the 12 Mosaic groups. More than 600 profiles describing demographics, purchasing behavior, media preferences, hobbies and interests, internet usage are available for viewing. In each of these portraits we have sought to highlight key features which make these categories distinctive and which would be useful to bear in mind when devising communications or marketing strategies targeted at them. These are necessarily subjective descriptions and are intended to highlight key issues rather than to be comprehensive. In each case we have sought to explain how these different consumer segments have come to be and how they currently are, not just to provide a mass of unrelated statistics.

Sources
Although much of the content may appear subjective, there is little that is not grounded in information of some sort. The portraits have taken into account a wealth of information from INSOURCE, Experian's comprehensive household level information, other Experian data assets and the U.S. Census. This information is supplemented with consumer behavioral information from Simmons and other research companies to provide a unique and distinct picture of each Mosaic Group and Type.

These portraits provide a wealth of information showing differences between the Mosaic Groups and Types across large numbers of consumer demographic characteristics, consumer behaviors, media preferences and attitudes. These portraits have made use of information cross tabulated by Mosaic from Simmons, as well as Experian's National Vehicle Data Base (NVDB) for automotive profiles and TrueTouch providing contact strategies profiles. In addition, profiles for top visited websites from Hitwise, the leading online competitive intelligence service, provide key insight into the online behavior of Mosaic households.

Caveats
Clearly, not every U.S. household matches exactly to just one of the sixty different Mosaic Types. These descriptions are therefore what sociologists would describe as 'ideal types'; pure examples to which individual cases approximate with varying degrees of exactness.

It's also important to recognize the scope of the labels. Not every household classified as 'Solid Suburban Life' is necessarily either young or married and some may not live in suburban areas. Indeed there may be quite a few residents in this Mosaic Type who fall into neither category. The labels therefore focus on the statistical bias of a type of household, on the demographic categories which are more numerous there than elsewhere in the country and which give the household its distinctive character.

Supporting Notes

In developing these portraits, and their labels, we are mindful of the fact that they will be read by a wide variety of people: by business analysts working for retailers and property developers who have a highly numeric approach to analysis; by account teams in advertising and direct marketing agencies whose method of working is very creative; by people working in government whose job requires them to frame discussion within terminology which conforms to current standards of political correctness; and by academics trained to test assertions by the rigour with which evidence is referenced from quoted sources. It is a challenge to meet all these needs in a single set of portraits and one which we hope we have been equal to.

Simmons Profiles

Founded over 50 years ago by legendary market researcher Willard Simmons, Simmons Market Research Bureau today is the nation's leading authority on the behavior of the American consumer. Today Simmons is a subsidiary company of Experian Marketing Solutions, enabling Simmons to combine its comprehensive information on consumer behavior, including media consumption and product preferences, with Experian's advanced data assets and analytical solutions. Simmons customers can experience the power of the combined data assets of Simmons and Experian by targeting consumers across multiple channels, using a common currency to analyze those consumers. Each year, Simmons interviews over 27,000 people nationwide in order to produce its well-known Simmons National Consumer Survey (NCS) on the marketplace behavior of American adults. In addition, Simmons collects comprehensive, insightful information on teens, kids and Hispanic consumers. Simmons's vast database, built from innovative syndicated and customized surveys, contains the most detailed usage information available on over 8,000 brands, 400 product categories and every media genre accessible in the U.S. Industry authorities acknowledge that Simmons's consumer data has helped bring more goods and services to market than any other research firm in North America.

To create the Mosaic Simmons profiles, Mosaic is appended to the Simmons NCS. More than 500 Mosaic/Simmons profiles covering demographics, shopping, media, attitudes, opinions and lifestyle interests are available in the Multimedia Guide.

For more information on Simmons, please visit www.smrb.com.

Automotive Profiles

To identify the top five automotives (make and model) for each Mosaic type, a one million household sample of Experian's National Vehicle Database (NVDB) was extracted and appended with INSOURCE demographic data and Mosaic. Approximately 834,000 households were used to create the NVDB profiles. Eight states with higher Hispanic populations were over-sampled (AZ, CA, FL, IL, NJ, NM, NY, and TX). These eight states were weighted appropriately to reflect their true population distribution across the US. Only those makes which exceeded a count of 500 and make-models which had a count greater than 250 were considered. The following Special/New/Luxury makes: Alfa-Romeo, Ferrari, Fiat, Hummer, Laforza, Lancia, Lotus, Maserati, Mini, Peugeot, and Rolls Royce were excluded. Count, Percent, Total Percent and Index were computed for the data set across all of the 60 Mosaic types.

Hitwise Website Profiles

Hitwise is the leading online competitive intelligence service. Only Hitwise provides its 1200 global clients with daily insights on how their customers interact with a broad range of competitive websites, and how their competitors use different tactics to attract online customers. Hitwise has partnered with Experian to provide Hitwise Lifestyle based on Mosaic profiles for more than 30,000 websites and 160 industry categories within the Hitwise U.S. service.

Since 1997, Hitwise has pioneered a unique, network based approach to Internet measurement. Through relationships with ISP's around the world, Hitwise's patented methodology anonymously captures the online usage, search and conversion behavior of 25 million Internet users. This unprecedented volume of Internet usage data is seamlessly integrated into an easy to use, web-based service, designed to help marketers better plan, implement and report on a range of online marketing programs. The Multimedia Guide provides Mosaic profiles for 50 well-known and frequented websites.

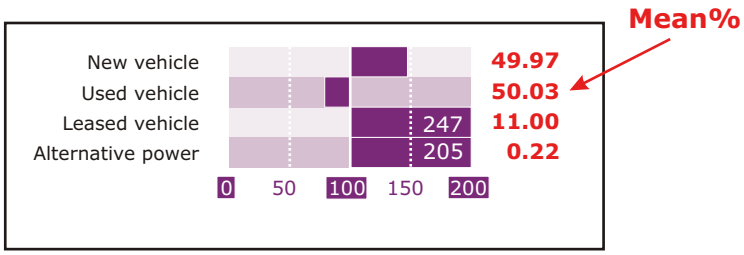
For more information on Hitwise, please visit their website www.hitwise.com.

Supporting Notes

Variables - Mean% and Index

Charts are provided for each of the variables used to build and describe Mosaic USA. The variables are grouped together by category. For each group/type, the charts show the Mean% and Index for each variable, unless otherwise noted.

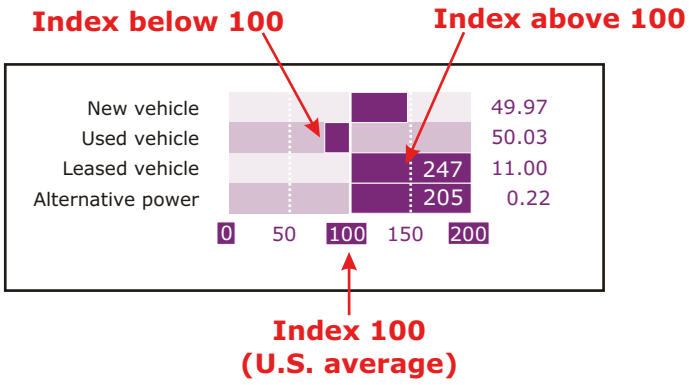
Understanding Mean% and Index
Mean% show the percentage of this group/type with this characteristic. For example, consider car ownership for Group A:



This shows that:
49.97% of Group A households have a new vehicle.
50.03% of Group A households have a used vehicle.
11.00% of Group A households have a leased vehicle, etc.

The **Index** shows how the variable compares with all households in the U.S.
An **Index of 100** is the U.S. average. An **Index greater than 100** shows that this variable is over-represented when compared with the U.S. An **Index less than 100** shows that this variable is under-represented when compared with the entire U.S.

The Index is shown on the chart as a bar:



The chart shows the Index value from 0 to 200. If the Index value is greater than 200, the bar is shown as 200 along with the exact Index.

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Group F Metro Fringe

Archie and Edith

Type F01 Steadfast Conservatives

Home to high-school educated mature singles and couples living in middle-class urban blue-collar neighborhoods

6.51%

Overview

Rankings
Age Rank 54/60
Wealth Rank 34/60

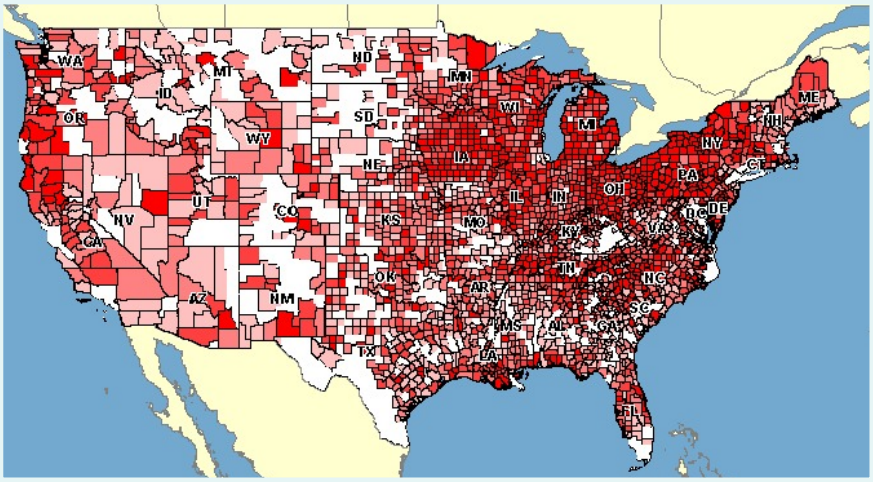
Top Markets
Philadelphia
Detroit
Pittsburgh
Chicago
St. Louis

Top Internet Sites
www.wwe.com
www.xanga.com
www.nascar.com
www.neopets.com
www.espn.com

Preferred Cars
Dodge Intrepid
Mercury Tracer
Oldsmobile Silhouette
Pontiac Montana
Saturn Ion

Locations

Key
- High
- Above Average
- Average
- Below Average
- Low



Contents

Group F Metro Fringe

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Description

Demographics

A quietly aging cluster, Steadfast Conservatives is home to mature singles and couples living in midscale urban neighborhoods. Households tend to be white, high school-educated and middle class. Many have begun to empty-nest or are already filled with couples and singles aged 65 years or older. The seniority of many residents does have benefits in the workplace. They earn middle class incomes from skilled jobs in manufacturing, retail and health care. Their incomes go far, allowing residents to own older homes and multiple cars and trucks at higher than average rates.

Lifestyles

The residents of Steadfast Conservatives live up to their old fashioned reputation. They think the stock market is too risky, computers and the Internet too confusing and take preventive medicine before any sign of illness. They even regard aerobic exercise as too strenuous, preferring to spend their leisure time fishing, gardening, antiquing or doing needlework or woodworking. For their social life, they attend activities sponsored by fraternal orders, veterans clubs and church groups. As consumers, they're likely to be brand loyal when they shop at favorite stores like J.C. Penney for clothes, Dick's Sporting Goods for outdoor gear and Jo-Ann for needlecrafts. With their middle-class incomes, they make a strong automotive market, especially for American-made pickup trucks and mid-sized sedans. To further protect their established lifestyles, they buy a variety of insurance products—covering health, life, car and home—though primarily low-value policies.

Media

Households in Steadfast Conservatives are fans of traditional media, including print, TV and radio. They like to get their news from a daily paper or the nightly newscasts on network TV. They consider television as a primary source of entertainment in their lives, and they have high rates for watching sitcoms, reality shows, daytime soaps and religious programs. They enjoy reading magazines that appeal to their do-it-yourself sensibilities including popular titles as Family Handyman, Better Homes & Gardens and Country Living. Their radio tastes include a mix of big band, classic rock, country and golden oldies. These households are mostly unenthusiastic about the Internet, but when online they engage in chat forums and visit NASCAR.com.

Group F Metro Fringe

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Who We Are

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*

Example Index / *Example* Mean %

11.11

Demographics

Gender

Male	65.00
Female	35.00

Age

18 - 24	1.98
25 - 34	4.97
35 - 44	13.58
45 - 54	23.38
55 - 64	19.75
65 - 74	17.39
75+	18.95

Marital Status

Married	60.48
Single - never married	3.15
Single - other	36.37

Number in Household

1 person	14.00
2 person	47.00
3 person	19.00
4 person	14.00
5+ person	6.12

Household Composition

Married, no children	47.00
Married, dependent children	22.00
Lone parent with children	7.78
1 dependent child	14.00
2+ dependent children	16.00

Age of Children

0 - 3	3.74
4 - 6	4.51
7 - 9	4.39
10 - 12	6.08
13 - 17	9.51

Length of Residence

1 year and less	1.25
2 - 5	7.01
6 - 10	14.96
11 - 14	19.71
15+	57.07

General Race

Asian, Pacific Islander	1.15
Black or African American	5.79
White	91.00
Not White or Black	3.39
Other race	2.24

Hispanic Race

Hispanic and White	2.05
Hisp. & Black African American	0.02
Hisp. & not White or Black	1.28
Hispanic born in US	2.12
Hispanic not born in US	0.88
Hispanic (HOH) born in US	2.88
Hispanic (HOH) not born in US	0.77

Religion

Christian	82.00
Jewish	0.58
Other	3.23
No religious preference	13.00

Education

Level of Education

Below high school diploma	13.00
High school diploma	45.00
Some college	20.00
Bachelors degree	7.87
Graduate degree	4.89

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Group F Metro Fringe

Archie and Edith

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6.51%

How We Make a Living

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*

Example Index

Example Mean %
11.11

Work

General

Full time	49.00
Part time	8.65
Females over 30 hours	21.00
Males over 51 hours	3.97
Not employed	42.00
Temporarily unemployed	3.42
Work at home	0.90
Looking after home	5.95
Retired	26.00
Full time student	0.82
Self-employed	4.83
Never worked	0.72

Occupation

Top management	3.84
Professional and technical	16.00
Sales and service	16.00
Farm related	0.10
Blue-collar	4.40
Other	21.00

Industry

Agriculture/forestry/fishing	1.04
Mining and construction	3.08
Manufacturing	6.19
Transport, comms, utilities	3.50
Wholesale and retail trade	8.55
Real estate, rental, leasing	0.40
Other services	9.18
Public admin/active military	4.01
Educational services	3.97
Health care, social services	6.77
Information	0.51
Finance and insurance	2.96
Professional/scientific/tech	2.59
Management/admin/waste	1.85
Accommodation/food	2.23
Arts/entertainment	0.79

Income

Household Income

Under $15,000	14.31
$15,000 - $24,999	14.13
$25,000 - $34,999	12.82
$35,000 - $49,999	19.25
$50,000 - $74,999	21.38
$75,000 - $99,999	9.88
$100,000 - $149,999	5.83
$150,000 - $249,999	1.64
$250,000+	0.76

Handling Money

Banking

Checking account	59.00
Savings account(s)	54.00
Savings Certificates Cd (Long Term)	13.00
Savings Certificates Cd (Short Term)	4.27
Cash management accounts	2.30
Check guarantee card	2.85
Debit card, EFT	22.00
Internet banking	19.00
ATM card	55.00

Credit Cards

Usually pay in full	25.00
Usually pay in part	22.00
Usually pay minimum	4.98
Have store card	37.00

Loans

Secured line of credit	2.92
Unsecured line of credit	3.13
Auto loan (new or used)	31.00
Home improvement loan	4.21
Home mortgage loan	27.00
Personal loan	8.38

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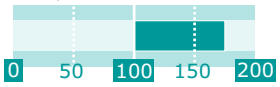
Example Index



Example Mean %
11.11

Handling Money

Savings & Investments

Bonds	15.00
Stocks	12.00
College savings	2.13
Money market	9.42
Mutual funds	16.00
Tax shelters	4.51
Online trading	1.16
401K	19.00
IRA	18.00
Investment in collectibles	2.40
International investments	0.60
KEOGH, SEP-IRA, PENSION	3.14

Shareholdings

High value (over $50,000)	2.13
Low value (under $50,000)	8.86

Medical Insurance

Company	53.00
Private	18.00
Medicare, Medicaid, Medigap Memebership	22.00

Life Insurance

Have life insurance	69.00
Over $500,000	2.04
$200,000 - $499,999	3.98
$100,000 - $199,999	11.00
$50,000 - $99,999	12.00
$20,000 - $49,999	14.00
Less than $20,000	21.00
Group life	16.00
Individual annuity	4.34
Term life	27.00
Whole, universal, variable (cash value)	22.00

Where We Live

Type of Property

Multiple family dwellings	0.09
Single family dwellings	99.91

Property Value

Under $50,000	9.79
$50,000 - $74,999	14.00
$75,000 - $99,999	20.00
$100,000 - $149,999	26.00
$150,000 - $199,999	12.00
$200,000 - $299,999	8.68
$300,000 - $499,999	3.80
$500,000 - $749,999	0.85
Over $750,000	0.32

Home Ownership

Home owner	99.64
Renter	0.33
Home improvement loans	4.21
Home mortgage (1st)	27.00
Home equity loan	14.00

Insurance

Homeowner's insurance	72.00

Group F Metro Fringe

Archie and Edith

Type F01 Steadfast Conservatives

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Our Home Lives

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*

Example Index — *Example* Mean % 11.11 — 0 50 100 150 200

Car Ownership

Number of Cars

1 car per household	24.00
2 cars per household	38.00
3+ cars per household	34.00

Types of Car

New vehicle	31.40
Used vehicle	68.60
Leased vehicle	3.93
Alternative power	0.05
Mid range	25.37
Mid range premium	2.51
Pickup	22.13
Small	11.70
Sports	3.98
Sports wagon	1.87
Sports wagon premium	0.19
SUV large	2.79
SUV medium	8.81
SUV premium	0.17
Traditional	4.78
Upscale and luxury	6.30
Full size van	2.28
Mini van	7.08

Insurance

Auto insurance	87.00

Pets

Have a dog	42.00
Have a cat	31.00
Have a dog or cat	56.00

0 50 100 150 200

Travel and Vacations

General

Internet used last month	18.00
Cruise last 3 years	8.86
Foreign travel last 3 years	34.00

In Last Year

6+ domestic trips	12.00
6+ domestic flights (business)	0.32
6+ domestic flights (personal)	1.16
$1,000+ on domestic trip	7.95
6+ nights in hotel (business)	3.32
6+ nights in hotel (personal)	15.00
Water sports/beach activities	2.09

Collectibles

Porcelain/crystal figurines	8.65
Die-cast/other miniatures	8.58
Disney/Warner/Hanna-Barbera	4.75
Coins (Numismatic)	11.00
Decorative plates	2.10
Collectible dolls	3.77
Ornaments	6.11
Paper collectibles	4.29
Sports memorabilia/cards	5.16
Stamps	2.86

Memberships

AARP	21.30
Art associations	2.07
Business clubs	2.24
Civic clubs	2.15
Country clubs	1.14
PTA, Parents Association	3.54
Union	8.75
Veterans club	5.12

0 50 100 150 200

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Our Home Lives

Charts show Index and Mean %
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Example Index — *Example* Mean % 11.11

0 50 100 150 200

Sports

Aerobics	9.11
Archery or target shooting	9.90
Auto racing or rallying	2.70
Backpacking, hiking	9.60
Baseball	9.02
Basketball	15.00
Bicycling	20.00
Billiards/pool	20.00
Bowling	20.00
Camping trips (overnight)	16.00
Fitness, walking, exercise	40.00
Fly fishing	22.00
Football	8.51
Golf	14.00
Hockey	2.71
Horseback riding	4.74
Hunting	10.00
Ice/in-line/roller skating	8.92
Jet ski, wave running/biking	4.02
Jogging, running	8.40
Martial arts, kickboxing	2.92
Motorcycling	7.72
Mountain/rock climbing	4.42
Power boating	6.52
Racquetball	3.62
Rowing	4.32
Sailing	2.09
Skateboarding	2.60
Skin diving or snorkeling	3.99
Snow boarding/mobiling	7.35
Soccer	4.55
Softball	8.69
Surfing, windsurfing	3.94
Swimming	31.00
Tennis	4.54
Using cardio machine	11.00
Volleyball	7.65
Water skiing	2.86
Weight training	15.00
Yoga	4.64

0 50 100 150 200

Entertainment and Leisure

Antique shopping/shows	18.00
Bars, nightclubs, dancing	17.00
Beach or lake	31.00
Board/card games	47.00
Bird watching	12.00
Buy books	52.00
Buy games and toys	53.00
Buy state lottery tickets	52.00
Casino and gambling	34.00
Comedy club	9.55
Concerts	26.00
Cooking for fun	31.00
Dance performance	7.53
Dining out (not fast food)	59.00
Education courses	11.00
Gardening	38.00
Go carting	3.61
Listen to music	67.00
Live theater	19.00
Member of CD/tape club	4.84
Movies (last 6 months)	63.00
Nascar racing	13.00
Needlework, quilting	14.00
Painting, drawing, sculpting	8.83
Photography	18.00
Play bingo	8.12
Play musical instrument	10.00
Read books	52.00
Read comics	8.92
Read gaming magazines	5.35
State fairs/zoo/museums	32.00
Theme parks	19.00
Woodwork, furniture	11.00

Home Entertainment

DVD players	73.00
MP3 players	6.77
Video games	22.00
Play, download online games	14.00
Satellite dish	25.00
Satellite radio	2.94

0 50 100 150 200

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Example Index

Example Mean %
11.11

Computing and Internet

Personal computer	73.00
Laptop computer	8.45
Connected to Internet	44.00
Broadband access at home	6.47
E-mail in last month	48.00
PDA	5.07
Computer games	42.00

Internet Activity

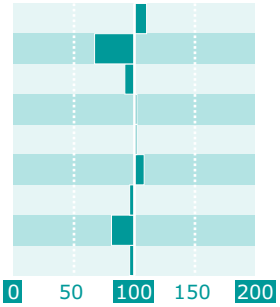
High at home	11.00
Medium at home	9.68
Low at home	11.00
High at work	7.27
Medium at work	7.78
Low at work	7.63

Websites By Category

Auctions	8.62
Banking	18.70
Chat forums	6.17
Employment search	8.81
Financial information	7.09
Instant messaging	13.10
News, weather	25.20
Personal ads, dating	1.60
Online gambling	1.44
Electronic greetings cards	7.08
Shopping - gathering info	12.90
Sports	7.67
Yellow pages	8.70

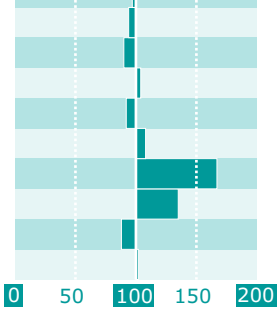
Individual Websites*

geocities.yahoo.com
moneycentral.msn.com
www.amazon.com
www.aol.com
www.ask.com
www.autotrader.com
www.cars.com
www.cnn.com
www.disney.com



Individual Websites*

www.dogpile.com
www.drudgereport.com
www.ebay.com
www.eharmony.com
www.espn.com
www.etrade.com
www.expedia.com
www.foodnetwork.com
www.freecreditreport.com
www.google.com
www.hotmail.com
www.mapquest.com
www.marketwatch.com
www.monster.com
www.msn.com
www.msnbc.com
www.mtv.com
www.myspace.com
www.nascar.com
www.neopets.com
www.nick.com
www.netflix.com
www.nytimes.com
www.orbitz.com
www.overstock.com
www.partypoker.com
www.paypal.com
www.priceline.com
www.shopping.com
www.ticketmaster.com
www.travelocity.com
www.univision.com
www.usatoday.com
www.victoriassecret.com
www.walmart.com
www.weather.com
www.webmd.com
www.wwe.com
www.xanga.com
www.yahoo.com
www.yellowpages.com



** Mean % is not available for individual websites*

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Example Index — *Example* Mean % 11.11

0 50 100 150 200

Telephones

International calls	10.00
Prepaid calling card	18.00

Cellular Phones

Have a cellular phone	64.00
Business	7.36
Personal	54.00
Analog mode	13.00
Call blocking	9.60
Call forwarding	18.00
Call waiting	31.00
Caller Id	43.00
Digital mode	18.00
Internet access	14.00
Nationwide coverage	24.00
Text messaging	27.00
Three way calling	14.00
Voice mail	43.00
Monthly bill $150+	2.49
Monthly bill $100 - $149	6.26
Monthly bill $50 - $99	21.00
Monthly bill under $50	30.00

Radio

High drive time	20.00
Medium drive time	18.00
Low drive time	22.00
High all day	20.00
Medium all day	19.00
Low all day	21.00
All news	16.50
All sports	3.54
Black rhythm and blues	0.27
Classic rock	11.50
Classical	2.66
Country (or Western)	25.40
Easy listening	5.80
Golden oldies	11.90
Jazz	2.42
Spanish	1.31
Urban contemporary	5.15
Mexican, Ranchera, Tejano	1.31

0 50 100 150 200

TV and Cable

High prime time	25.00
Medium prime time	20.00
Low prime time	18.00
High early and late fringe	24.00
Medium early and late fringe	22.00
Low early and late fringe	18.00
High all day	26.00
Medium all day	20.00
Low all day	17.00
High cable TV	20.00
Medium cable TV	22.00
Low cable TV	18.00

TV Primetime

Comedy and variety	18.40
News and documentary	30.40
Feature film	13.30
General drama	63.60
Nature	3.84
Reality	50.40
Science	4.26
Situation comedy	47.40
Sports	11.10
How-To	16.70

TV Daytime

Drama	17.20
News	27.60
Game show or contest	10.00
Talk or informational	7.12

TV Early Evening

Weekday news	40.00
Weekend news	30.20

TV Late Fringe

Monday - Friday	22.10
Weekend	13.00

0 50 100 150 200

mosaic USA
experian

Group F Metro Fringe

Archie and Edith

Type F01 Steadfast Conservatives

Home to high-school educated mature singles and couples living in middle-class urban blue-collar neighborhoods

6.51%

Our Home Lives

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes***
for further details

Example Index — *Example* Mean % 11.11

0 50 100 150 200

Magazines

High	18.00
Medium	19.00
Low	21.00
Airline, In Flight	3.84
Automotive	18.00
Black African American	6.28
Bridal	1.31
Business and finance	9.53
Child rearing, parenthood	20.00
Computers	4.20
Entertainment	49.00
Epicurean	5.72
Fishing/hunting/outdoor	17.00
General editorial	83.00
Health and fitness	23.00
Home and home services	62.00
Men's	21.00
Metropolitan/regional/state	10.00
Music	6.48
News	29.00
News weeklies	20.00
Photography	1.30
Science, technology	8.50
Special appeal	37.00
Sports	16.00
Teens	5.30
Travel	4.64
Women's	81.00
Women's beauty, grooming	7.20

0 50 100 150 200

Newspapers

New York Times	1.11
USA Today	2.47
Washington Post	0.39
Wall Street Journal	0.60

Last Part Read (Daily)

Business, finance	15.00
Classified	17.00
Comics	19.00
Editorial	18.00
Entertainment	17.00
Fashion	5.00
Food or cooking	13.00
Front page	43.00
General news	35.00
Home, furnishings, gardening	10.00
Movie listings and reviews	11.00
Science and technology	6.72
Sports	21.00
Travel	5.97
TV or radio listing	14.00

Last Part Read (Sunday)

Business, finance	11.00
Classified	16.00
Comics	20.00
Editorial	15.00
Entertainment	18.00
Fashion	6.27
Food or cooking	12.00
Front page	36.00
General news	29.00
Home, furnishings, gardening	11.00
Movie listings and reviews	12.00
Science and technology	7.53
Sports	18.00
Travel	9.28
TV or radio listing	13.00

0 50 100 150 200

mosaic USA
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Group F Metro Fringe

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Our Home Lives

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*

Example Index / *Example* Mean %: 11.11

0 50 100 150 200

Shopping Habits

Stores Visited

Any convenience	53.00
Drug	76.00
Home electronics	26.00
Home furnishing/houseware	19.00
Home improvement	60.00
Office supply, computer	25.00
Shopping mall	57.00
Department/discount	57.00

Reason Store Visited

Price	71.00
Convenience	56.00

Frequency & Spend (Groceries)

10+ visits/month	44.00
4 - 9 visits/month	36.00
1 - 3 visits/month	8.75
$150+/week	12.00
$51 - $149/week	67.00
Less than $50/week	16.00

Customers refer to (non-food shopping)

Advertising on floor	42.00
Advertising on cart	11.00
Department signs, aisle	53.00
Lighted graphics	26.00
On the Internet	15.00
Radio, PA announcements	25.00
Signs on merchand racks	54.00
Store brochures, flyers	59.00

Customers refer to (food shopping)

Advertising on floor	52.00
Advertising on cart	11.00
Announcements in store	33.00
Computerized information	18.00
In-store demonstrations	35.00
In-store samples	45.00
On the Internet	8.54
Overhead aisle markers	50.00
Radio, PA announcements	23.00

0 50 100 150 200

Internet Order

Bought 6+ times	3.31
Bought 1-5 times	12.00
Spent $500+	8.31
Apparel, accessories	9.06
Automotive products	2.04
Banking services	2.63
Books, music, video	11.00
Collectibles	3.57
Computer products	6.29
Electronics, appliances	2.12
Food, perishables	1.21
Footwear	3.00
Gardening	1.45
Giftware	1.89
Home furnishings	2.52
Housewares	1.32
Office supplies	1.20
Prescriptions, health items	3.56
Sporting goods, equipment	3.52
Tickets for events (not movies)	4.05
Tickets for movies	1.60
Toys, games	4.48
Travel services, packages	4.89

Mail or Phone Order

Bought in last year	42.00
Spent $500+	5.53
Apparel, accessories	12.00
Books, music, video	6.15
Collectibles	3.17
Food, perishables	1.23
Footwear	3.06
Gardening	2.09
Giftware	2.26
Home furnishings	3.25
Housewares	2.39
Prescriptions, health items	6.16
Tickets for events (not movies)	2.04
Toys, games	1.91
Travel services, packages	1.84

0 50 100 150 200

mosaic USA
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Group F Metro Fringe

Archie and Edith

Type F01 Steadfast Conservatives

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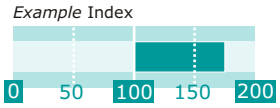
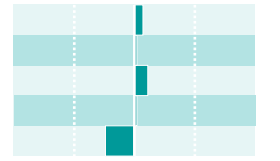
6.51%

How We View The World

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*

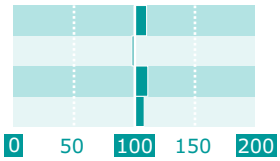


Political Outlook



Very conservative	12.00
Somewhat conservative	23.00
Middle of the road	37.00
Somewhat liberal	13.00
Very liberal	3.59

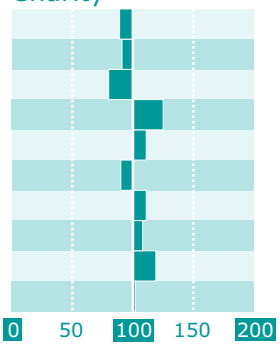
Political Affiliation



Democrat	34.00
Independent	9.75
Republican	31.00
Other political affiliation	4.69

0 50 100 150 200

Charity

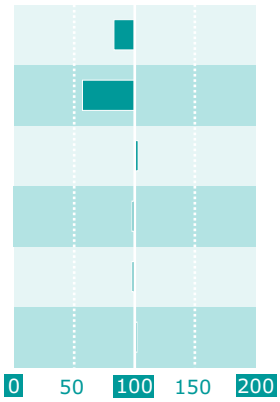


Arts, culture, humanities	7.72
Education	13.00
Environmental	5.39
Health	20.00
Political organization	9.00
Public radio	3.55
Public television	5.81
Private foundations	15.00
Religious	49.00
Social services, welfare	15.00

0 50 100 150 200

Attitudes

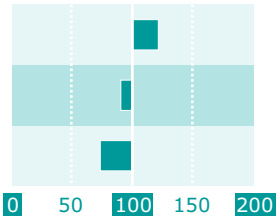
Cars



I like a new car every 2 or 3 years	12.60
Foreign cars have more prestige than American	6.26
A used car is just as good as a new car	42.80
My car should express my personality	29.30
I normally buy cars brand new	31.60
I get many options when I buy a car	39.10

0 50 100 150 200

Travel



I prefer US travel to foreign travel	55.80
I take a vacation somewhere different every time	38.70
I love the idea of travelling abroad	28.70

0 50 100 150 200

Group F Metro Fringe

Archie and Edith

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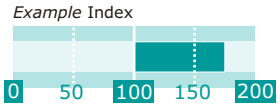
Attitudes

Charts show Index and Mean %
Index 100 indicates US average
*See **Supporting Notes** for further details*



Work

Work centered	33.90
I am a workaholic	20.90
Would like to set up my own business	27.50
I look at work as a career not just a job	38.70

Life

I am very happy with my life as it is	61.50
I like to enjoy life and don't worry about future	48.20
I prefer to spend a quiet evening at home	66.60
How I spend time is more important than money	58.80
I am good at fixing things	52.80
I am good at fixing mechanical things	40.10
I am happy with my standard of living	50.10
My life is family centered	40.20
I like spending most time at home with my family	64.30
I provide my children with things I didn't have	51.10
I indulge my children with the little extras	48.40
I do things on the spur of the moment	45.30

0 50 100 150 200

Finance

Pay any price for good financial advice	11.00
I feel secure financially	30.60
I am careful with my money	62.00
I am a careful money manager	40.90
I am bad at saving money	27.10
I know nothing about finance and investments	24.50
I tend to spend money without thinking	20.30

Health and Food

I pay anything when it concerns my health	38.80
At the first sign of pain, I take medicine	21.30
When I am ill it is important to go to the doctor	57.50
Medication has made my life better	46.60
I should exercise more than I do	74.00
I make sure I exercise regularly	31.50
I do some sport or exercise once a week	48.50
I try to eat healthier foods these days	64.60
I enjoy eating foreign foods	35.80
I like to try new food products	48.70
I prefer fast food to home cooking	7.60

0 50 100 150 200

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Attitudes

Charts show Index and Mean %
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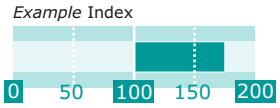


Internet

I like websites that protect my privacy	56.00
I get more of my news from the Internet	20.50
I do more shopping on the Internet than before	20.40
I like to hear about products/services by email	11.40

Computing/Electronics

Early adoptor	33.50
I love to buy new gadgets and appliances	24.80
I am first of friends to have electronic equipment	9.27
I pay anything for the electronic equipment I want	7.73
Tech shy	43.90
Computers confuse me, I'll never get used to them	30.80

TV

I find TV advertising interesting	28.70
I rely on TV to keep me informed	52.90
Typically, I avoid watching TV commercials	42.30
Advertising to children is wrong	43.10
Advertising a waste of time	26.00
I enjoy watching children's TV with my children	30.00

Newspapers

I rely on newspapers to keep me informed	48.00

0 50 100 150 200

Shopping

I only shop at my favorite stores - have brands I like	67.30
Normally, I only shop at nearby shops	55.90
I especially enjoy shopping with opposite sex	19.70
I use the Internet to help plan shopping trips	10.20
I wait for the sales	49.20
I shop for specials or bargains	57.80
I change brands often for variety and novelty	16.80
My children have a significant impact on brands	20.80
I am a child influenced shopper	31.00
I am an impulse shopper	36.90

Fashion

I have favorite clothing brands I stick with	56.50
I like to keep up with the latest fashions	21.00
Everything I wear is of the highest quality	23.10
I no longer wear clothes I wore a year ago	9.79

0 50 100 150 200

Supporting Notes

Mosaic USA is a lifestyle consumer segmentation system that classifies all U.S. households and neighborhoods into 60 unique Mosaic consumer segments and 12 lifestyle groupings that share similar demographic and socio-economic characteristics.

Mosaic is built using INSOURCE household level data and the wealth of Experian data assets. It utilizes more than 300 demographic variables including more than 70 INSOURCE household characteristics. Mosaic is linked to Experian's Simmons Market Research Bureau National Consumer Survey and other market research data providing insight into consumer purchasing behavior, media and channel preferences, opinions and attitudes.

Mosaic was developed on more than 20 years of segmentation development expertise from the global leader in segmentation systems. Experian has built more than 40 consumer segmentation systems around the globe and Mosaic is available in more than 25 countries. Mosaic USA is linked to a global segmentation network, providing the ability to extend your consumer targeting for international applications. Mosaic Global is based on the same premise of shared consumer patterns and classified into 10 distinct groups that are consistent across country borders.

Mosaic Portraits
These portraits have been designed to help users understand the essence of each of the sixty Mosaic types and the 12 Mosaic groups. More than 600 profiles describing demographics, purchasing behavior, media preferences, hobbies and interests, internet usage are available for viewing. In each of these portraits we have sought to highlight key features which make these categories distinctive and which would be useful to bear in mind when devising communications or marketing strategies targeted at them. These are necessarily subjective descriptions and are intended to highlight key issues rather than to be comprehensive. In each case we have sought to explain how these different consumer segments have come to be and how they currently are, not just to provide a mass of unrelated statistics.

Sources
Although much of the content may appear subjective, there is little that is not grounded in information of some sort. The portraits have taken into account a wealth of information from INSOURCE, Experian's comprehensive household level information, other Experian data assets and the U.S. Census. This information is supplemented with consumer behavioral information from Simmons and other research companies to provide a unique and distinct picture of each Mosaic Group and Type.

These portraits provide a wealth of information showing differences between the Mosaic Groups and Types across large numbers of consumer demographic characteristics, consumer behaviors, media preferences and attitudes. These portraits have made use of information cross tabulated by Mosaic from Simmons, as well as Experian's National Vehicle Data Base (NVDB) for automotive profiles and TrueTouch providing contact strategies profiles. In addition, profiles for top visited websites from Hitwise, the leading online competitive intelligence service, provide key insight into the online behavior of Mosaic households.

Caveats
Clearly, not every U.S. household matches exactly to just one of the sixty different Mosaic Types. These descriptions are therefore what sociologists would describe as 'ideal types'; pure examples to which individual cases approximate with varying degrees of exactness.

It's also important to recognize the scope of the labels. Not every household classified as 'Solid Suburban Life' is necessarily either young or married and some may not live in suburban areas. Indeed there may be quite a few residents in this Mosaic Type who fall into neither category. The labels therefore focus on the statistical bias of a type of household, on the demographic categories which are more numerous there than elsewhere in the country and which give the household its distinctive character.

Supporting Notes

In developing these portraits, and their labels, we are mindful of the fact that they will be read by a wide variety of people: by business analysts working for retailers and property developers who have a highly numeric approach to analysis; by account teams in advertising and direct marketing agencies whose method of working is very creative; by people working in government whose job requires them to frame discussion within terminology which conforms to current standards of political correctness; and by academics trained to test assertions by the rigour with which evidence is referenced from quoted sources. It is a challenge to meet all these needs in a single set of portraits and one which we hope we have been equal to.

Simmons Profiles

Founded over 50 years ago by legendary market researcher Willard Simmons, Simmons Market Research Bureau today is the nation's leading authority on the behavior of the American consumer. Today Simmons is a subsidiary company of Experian Marketing Solutions, enabling Simmons to combine its comprehensive information on consumer behavior, including media consumption and product preferences, with Experian's advanced data assets and analytical solutions. Simmons customers can experience the power of the combined data assets of Simmons and Experian by targeting consumers across multiple channels, using a common currency to analyze those consumers. Each year, Simmons interviews over 27,000 people nationwide in order to produce its well-known Simmons National Consumer Survey (NCS) on the marketplace behavior of American adults. In addition, Simmons collects comprehensive, insightful information on teens, kids and Hispanic consumers. Simmons's vast database, built from innovative syndicated and customized surveys, contains the most detailed usage information available on over 8,000 brands, 400 product categories and every media genre accessible in the U.S. Industry authorities acknowledge that Simmons's consumer data has helped bring more goods and services to market than any other research firm in North America.

To create the Mosaic Simmons profiles, Mosaic is appended to the Simmons NCS. More than 500 Mosaic/Simmons profiles covering demographics, shopping, media, attitudes, opinions and lifestyle interests are available in the Multimedia Guide.

For more information on Simmons, please visit www.smrb.com.

Automotive Profiles

To identify the top five automotives (make and model) for each Mosaic type, a one million household sample of Experian's National Vehicle Database (NVDB) was extracted and appended with INSOURCE demographic data and Mosaic. Approximately 834,000 households were used to create the NVDB profiles. Eight states with higher Hispanic populations were over-sampled (AZ, CA, FL, IL, NJ, NM, NY, and TX). These eight states were weighted appropriately to reflect their true population distribution across the US. Only those makes which exceeded a count of 500 and make-models which had a count greater than 250 were considered. The following Special/New/Luxury makes: Alfa-Romeo, Ferrari, Fiat, Hummer, Laforza, Lancia, Lotus, Maserati, Mini, Peugeot, and Rolls Royce were excluded. Count, Percent, Total Percent and Index were computed for the data set across all of the 60 Mosaic types.

Hitwise Website Profiles

Hitwise is the leading online competitive intelligence service. Only Hitwise provides its 1200 global clients with daily insights on how their customers interact with a broad range of competitive websites, and how their competitors use different tactics to attract online customers. Hitwise has partnered with Experian to provide Hitwise Lifestyle based on Mosaic profiles for more than 30,000 websites and 160 industry categories within the Hitwise U.S. service.

Since 1997, Hitwise has pioneered a unique, network based approach to Internet measurement. Through relationships with ISP's around the world, Hitwise's patented methodology anonymously captures the online usage, search and conversion behavior of 25 million Internet users. This unprecedented volume of Internet usage data is seamlessly integrated into an easy to use, web-based service, designed to help marketers better plan, implement and report on a range of online marketing programs. The Multimedia Guide provides Mosaic profiles for 50 well-known and frequented websites.

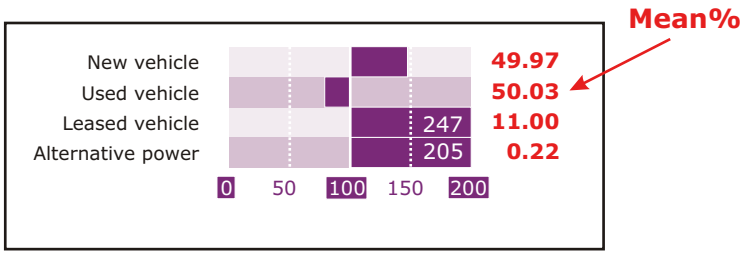
For more information on Hitwise, please visit their website www.hitwise.com.

Supporting Notes

Variables - Mean% and Index

Charts are provided for each of the variables used to build and describe Mosaic USA. The variables are grouped together by category. For each group/type, the charts show the Mean% and Index for each variable, unless otherwise noted.

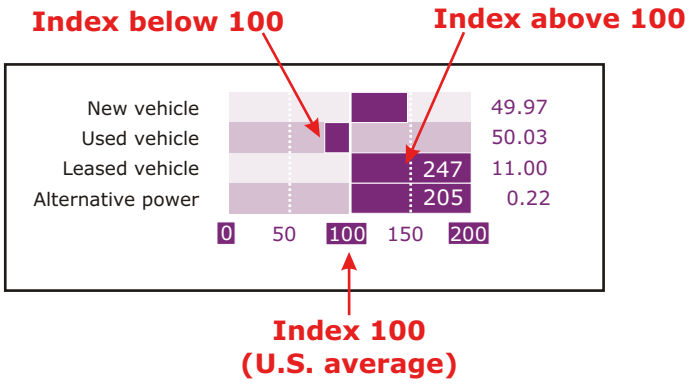
Understanding Mean% and Index
Mean% show the percentage of this group/type with this characteristic. For example, consider car ownership for Group A:



This shows that:
49.97% of Group A households have a new vehicle.
50.03% of Group A households have a used vehicle.
11.00% of Group A households have a leased vehicle, etc.

The **Index** shows how the variable compares with all households in the U.S.
An **Index of 100** is the U.S. average. An **Index greater than 100** shows that this variable is over-represented when compared with the U.S. An **Index less than 100** shows that this variable is under-represented when compared with the entire U.S.

The Index is shown on the chart as a bar:



The chart shows the Index value from 0 to 200. If the Index value is greater than 200, the bar is shown as 200 along with the exact Index.

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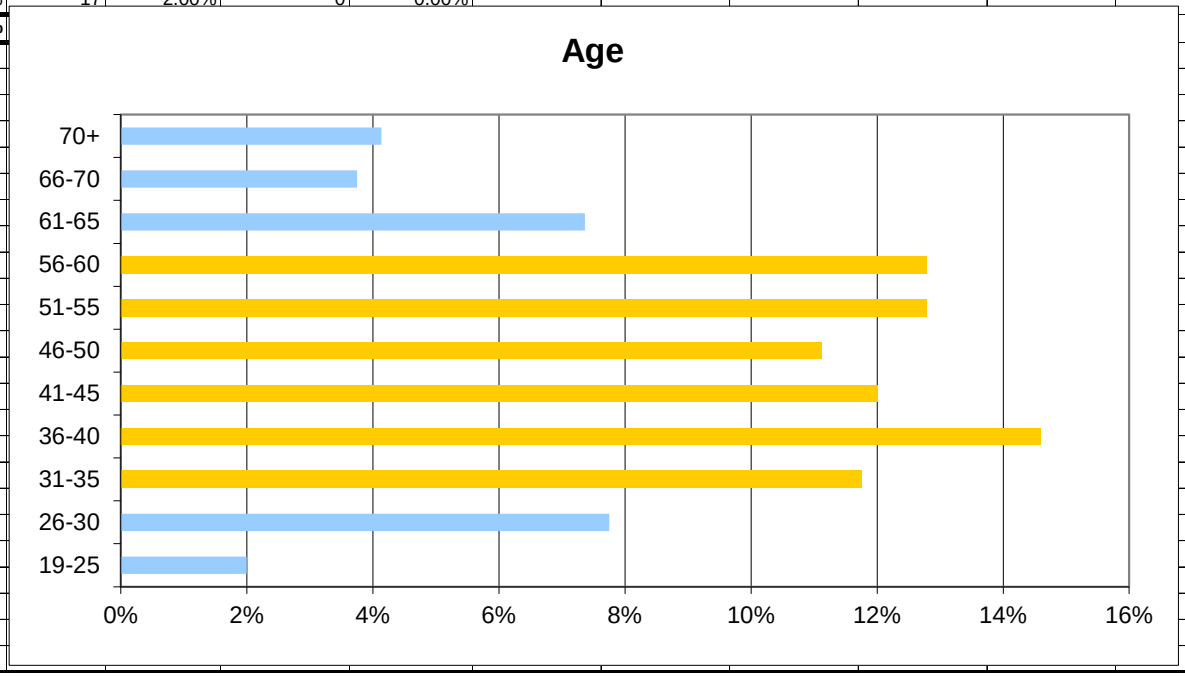
U-Pack Moving
Age
January 2007

Estimated Age Range	Total Overall	% Overall	Female Overall	%Female Overall	Male Overall	% Male Overall	Unknown	% Unknown
19-25	15	2%	7	1%	6	1.00%	2	0.30%
26-30	60	8%	27	3%	32	4.00%	1	0.10%
31-35	91	12%	39	5%	51	7.00%	1	0.10%
36-40	113	15%	43	6%	69	9.00%	1	0.10%
41-45	93	12%	38	5%	55	7.00%	0	0.00%
46-50	86	11%	41	5%	44	6.00%	1	0.10%
51-55	99	13%	41	5%	57	7.00%	1	0.10%
56-60	99	13%	49	6%	50	6.00%	0	0.00%
61-65	57	7%	33	4%	23	3.00%	1	0.10%
66-70	29	4%	14	2%	15	2.00%	0	0.00%
70+	32	4%	15	2%	17	2.00%	0	0.00%
Total	**774**	**100.00%**	**347**	**44.00%**				



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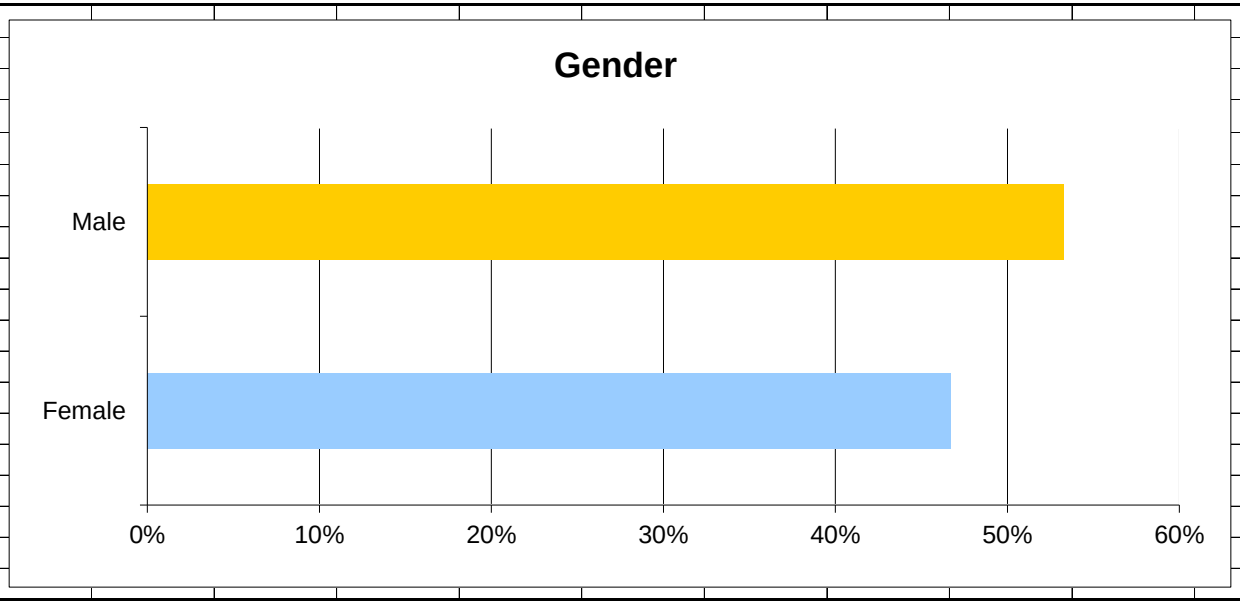
Overland Park, KS 66210
P 913 327 0055
F 913 327 0059
bozell.com
Bozell

U-Pack Moving
Gender
January 2007

Gender	Overall	Overall %
Female	377	46.72%
Male	430	53.28%
Both	0	0.00%
Total	**807**	**100.00%**



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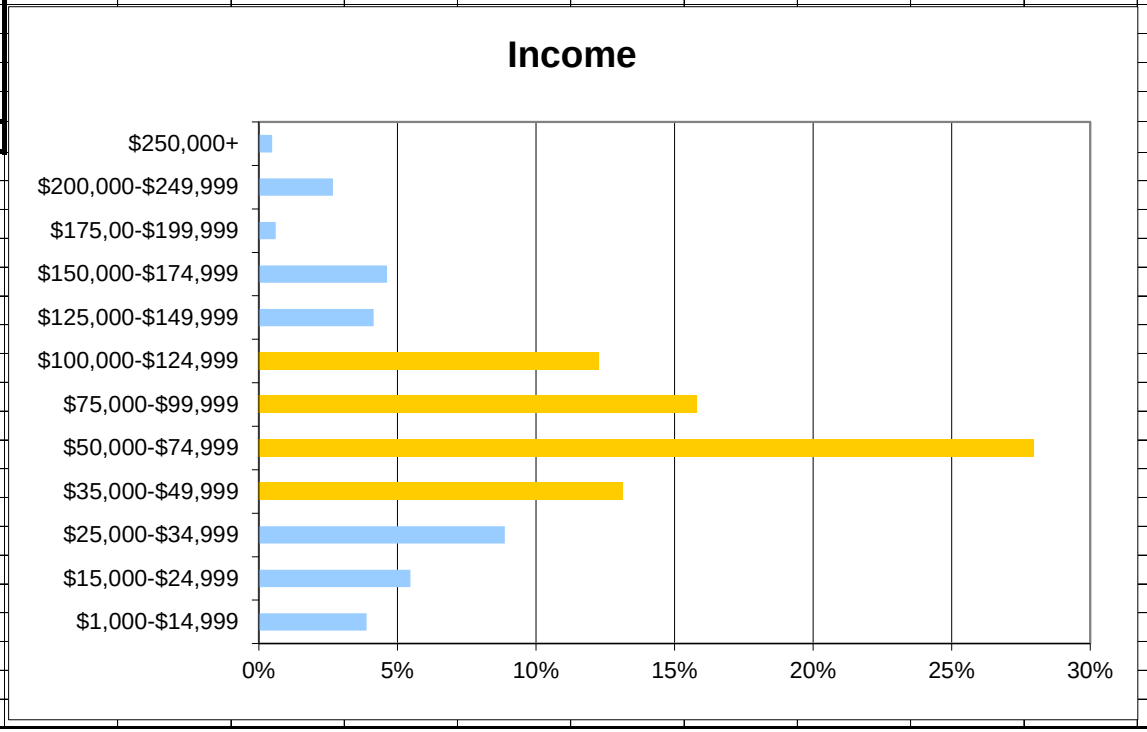
U-Pack Moving
Household Income
January 2007

Estimated Income	HH IncomeOverall	Overall %
$1,000-$14,999	32	4%
$15,000-$24,999	45	5%
$25,000-$34,999	73	9%
$35,000-$49,999	108	13%
$50,000-$74,999	230	28%
$75,000-$99,999	130	16%
$100,000-$124,999	101	12%
$125,000-$149,999	34	4%
$150,000-$174,999	38	5%
$175,00-$199,999	5	1%
$200,000-$249,999	22	3%
$250,000+	4	0%
Total	**822**	**100.00%**



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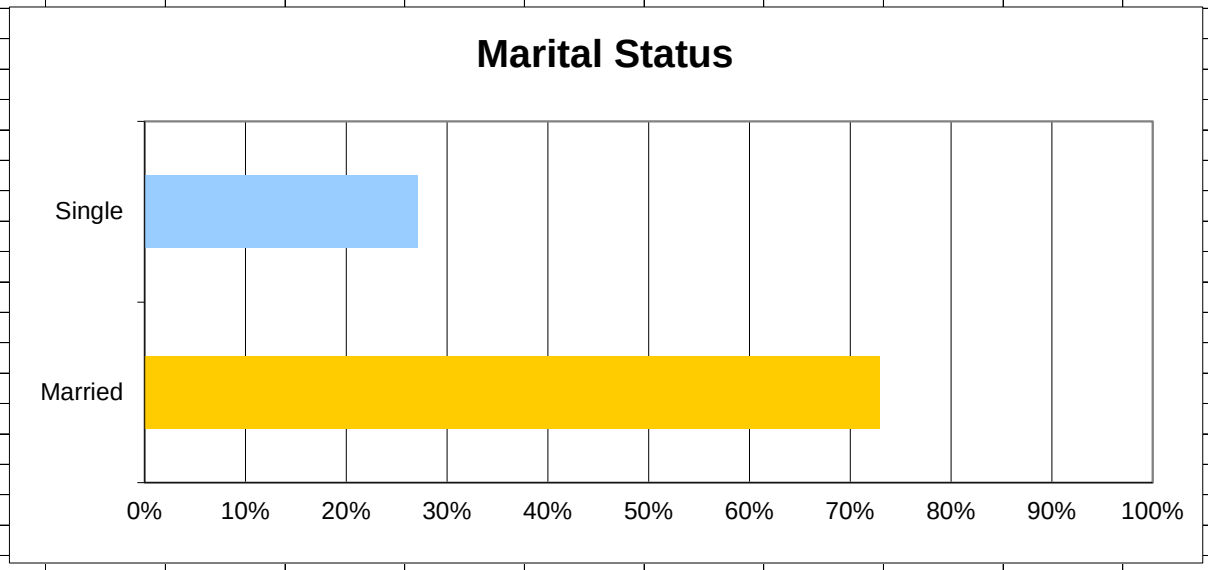
P 913 327 0055
F 913 327 0059
bozell.com
Bozell

U-Pack Moving
Marital Status
January 2007

Marital Status	Marital Status Overall	Overall %
Married	434	72.94%
Single	161	27.06%
Total	**595**	**100.00%**



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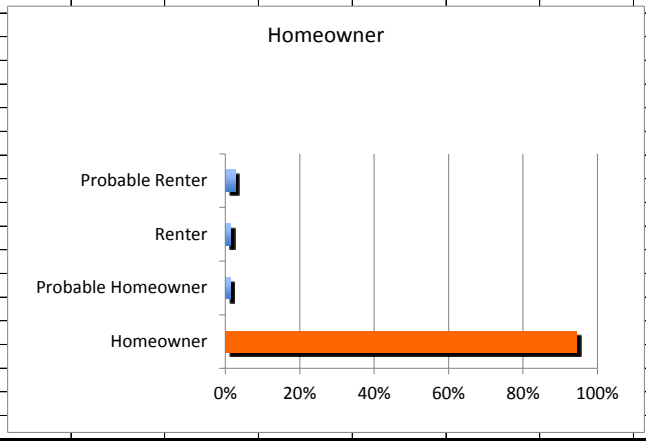
bozell.com
Bozell

January 25, 2007

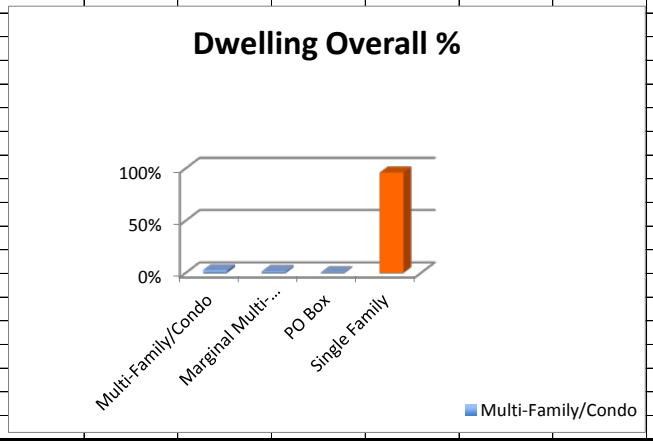
U-Pack Moving
Homeowner
January 2007

Homeowner Status	Homeowner Overall	Homeowner Overall %
Homeowner	715	95%
Probable Homeowner	10	1%
Renter	11	1%
Probable Renter	20	3%
Total	**756**	**100.00%**



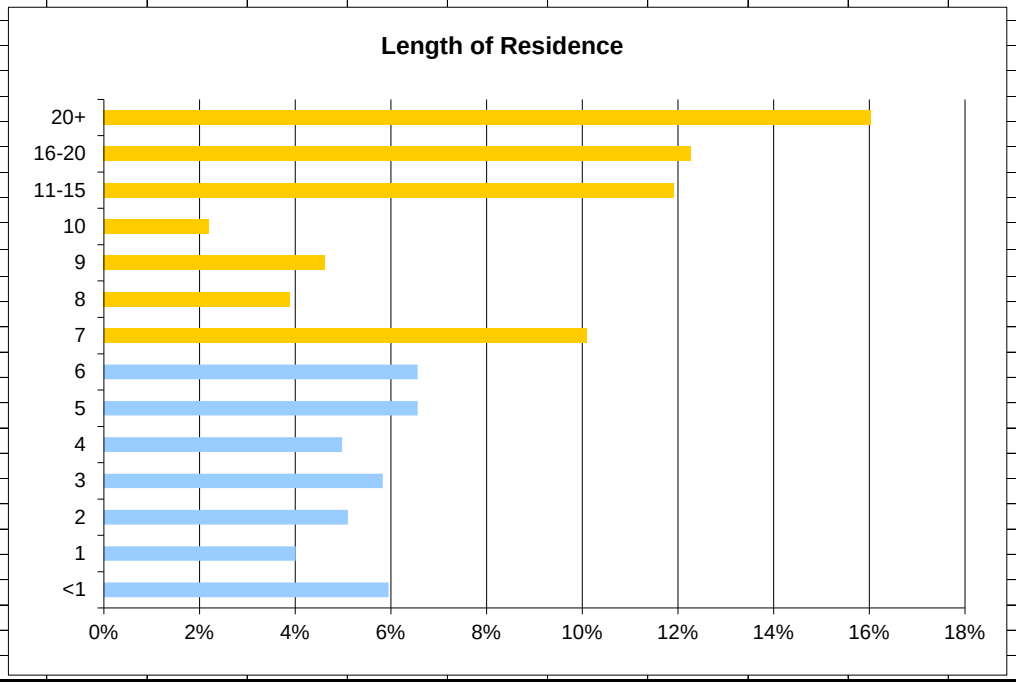
U-Pack Moving
Dwelling Type
January 2007

Dwelling Type	Dwelling Overall	Dwelling Overall %
Multi-Family/Condo	20	3%
Marginal Multi-Family	11	1%
PO Box	1	0%
Single Family	745	96%
Total	777	100.00%



U-Pack Moving
Length of Residence
January 2007

Length of Residence in Years	Overall	Overall %
<1	49	6%
1	33	4%
2	42	5%
3	48	6%
4	41	5%
5	54	7%
6	54	7%
7	83	10%
8	32	4%
9	38	5%
10	18	2%
11-15	98	12%
16-20	101	12%
20+	132	16%
Total	823	100.00%



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U-Pack Moving
Presence of Children
January 2007

Children Present	Present of Children Overall	Present of Children Overall %
Yes	204	41.98%
No	282	58.02%
Total	**486**	**100.00%**

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U-Pack Moving
Occupation
January 2007

Occupation	Overall	Overall %
Professional/Technical	61	39.87%
Upper Mgt/Exec	22	14.38%
Middle Mgt	12	7.84%
Sales/Service	16	10.46%
Retired	15	9.80%
Nurse	27	17.65%
Doctors/Physicians	0	0.00%
Total	**153**	**100.00%**

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U-Pack Moving
Education
January 2007

Education	Overall	Overall %
High School Grad	137	16.73%
Some Colllege	234	28.57%
Bachelor Degree	240	29.30%
Graduate Degree	155	18.93%
Less than High School Grad	53	6.47%
Total	**819**	**100.00%**

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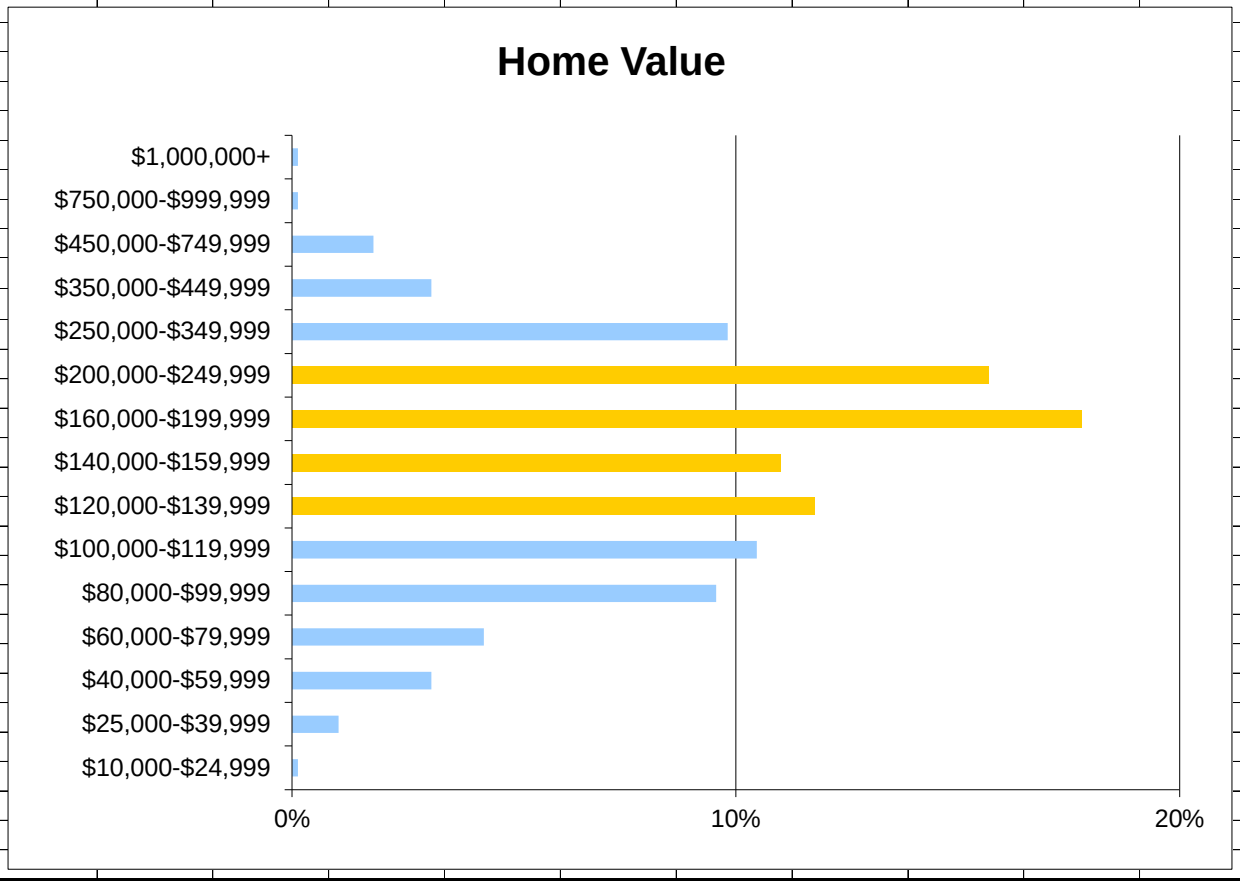
U-Pack Moving
Home Value
January 2007

Estimated Home Value	Overall	Overall %
$10,000-$24,999	1	0.13%
$25,000-$39,999	8	1.05%
$40,000-$59,999	24	3.14%
$60,000-$79,999	33	4.32%
$80,000-$99,999	73	9.55%
$100,000-$119,999	80	10.47%
$120,000-$139,999	90	11.78%
$140,000-$159,999	84	10.99%
$160,000-$199,999	136	17.80%
$200,000-$249,999	120	15.71%
$250,000-$349,999	75	9.82%
$350,000-$449,999	24	3.14%
$450,000-$749,999	14	1.83%
$750,000-$999,999	1	0.13%
$1,000,000+	1	0.13%
Total	**764**	**100.00%**



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January 25, 2007

Radio Copy

Bozell
Advertising
1022 Leavenworth St.
Omaha, NE 68102
402-965-4300

Client:	City of Omaha	**Job #:**	CityOm 8429
Description:	reEnergize :60 Radio - Omaha	**Date:**	3-20-12
Version:	V5	**Spot #:**	NBR0010

DISPATCHER (Brent Walker): 9-1-1, what's your emergency?

WOMAN (Sharon Douglas): I'd like to report a robbery in my home.

DISPATCHER: What was stolen?

WOMAN: My energy. Thousands of dollars worth.

DISPATCHER: I'm not sure I…

WOMAN: They took my gas, air, and electricity.

DISPATCHER: Look, is this a joke?

WOMAN: No. It's a robbery. I've been robbed of my…

DISPATCHER: Energy. Yes. Did you see the perpetrator?

WOMAN: Perpetrators.

DISPATCHER: There was more than one?

WOMAN: Yes. And they're living in my home.

DISPATCHER: You live with them? What do they look like?

WOMAN: Well, they're all older. One's a furnace; another is a water heater, insulation, pipes…

ANNOUNCER (Bob Davis): Thousands of homes in Omaha are being robbed of energy. But with an Energy Evaluation and simple upgrades you can rid your home of energy-draining thieves like poor insulation or old appliances. Act now and get $100 off an Energy Evaluation plus up to half of the cost of your upgrades that may save you hundreds in yearly energy costs. Hurry. Offer ends soon. For more information go to reEnergizeprogram.org or call 877-402-5111.

(faster)
reEnergize is a cooperative of the cities of Lincoln and Omaha, funded by a grant from the Department of Energy.

CITY OF OMAHA ENERGY SURVEY

Interview Schedule

PUBLIC OPINION STRATEGIES

Field Dates: February 16-17, 2011
Public Opinion Strategies

N=500 registered voters
Margin of Error: ±4.38%

** Denotes result less than 0.5%.*
^ Denotes rounding. Due to rounding, some figures may be higher or lower by less than one-half of one percent.

A. Are you registered to vote at this address?

100% YES **(CONTINUE)**

B. Are you, or is anyone in your household, employed by a newspaper, television or radio station, by an elected official, by a utility providing electrical power or a government agency overseeing energy issues?

100% NO **(CONTINUE)**

C. Do you live within the city limits? **(DO NOT READ)**

100% INSIDE **(CONTINUE)**

Now I would like to ask you some questions about some different energy sources used in our city--

SPLIT SAMPLED, N=249
After I read each one, please rate your feelings toward that energy source using a one to ten scale, where one means you have a VERY NEGATIVE feeling toward that energy source and ten means you have a VERY POSITIVE feeling. Five on this scale means you're neutral, you have neither a positive nor negative feeling. You can choose any number between one and 10, depending on how you feel.
(IF NOT SURE, CODE AS: DON'T KNOW/REFUSED, 99)

The (first/next) energy source is... **(RANDOMIZE)**

		10	**8-10**	**5-7**	**1-4**	**DK/REF**	**MEAN**
1.	Natural gas	18%	46%	48%	6%	–	7.1
2.	Coal	4%	15%	44%	41%	1%	4.8
3.	Nuclear	15%	31%	44%	23%	1%	6.0
4.	Solar power	32%	61%	31%	7%	1%	7.7
5.	Wind power	32%	62%	27%	11%	*	7.6
6.	Hydro power	20%	43%	49%	5%	3%	7.1
7.	Geothermal or ground source heat pumps	19%	39%	51%	8%	3%	6.9
8.	Waste to Energy Conversion	17%	39%	51%	5%	5%	6.9

Summary of Energy Sources - Ranked By %10

Energy Source	%10	%8-10	Mean
Wind power	**32%**	**62%**	**7.6**
Solar power	**32%**	**61%**	**7.7**
Hydro power	**20%**	**43%**	**7.1**
Geothermal or ground source heat pumps	**19%**	**39%**	**6.9**
Natural gas	**18%**	**46%**	**7.1**
Waste to Energy Conversion	**17%**	**39%**	**6.9**
Nuclear	**15%**	**31%**	**6.0**
Coal	**4%**	**15%**	**4.8**

SPLIT SAMPLED, N=251
Thinking ahead approximately ten years, please tell me how significant an energy source you believe each one of the following SHOULD be for Omaha. Should it be ... **(ROTATE BOTTOM TO TOP, TOP TO BOTTOM)** one of the biggest sources of energy, a significant source of energy, a minor source of energy, or not provide much energy at all?

The (first/next) energy source is... **(RANDOMIZE)**

		TOTAL BIGGEST/ SIGNIFICANT	**TOTAL MINOR/ NOT MUCH**	**ONE OF BIGGEST**	**SIGNIFICANT SOURCE**	**MINOR SOURCE**	**NOT MUCH AT ALL**	**DK/ REF (DNR)**
9.	Natural gas	**75%**	**25%^**	26%	49%	20%	4%	*
10.	Coal	**43%^**	**56%**	10%	32%	36%	20%	1%
11.	Nuclear	**47%**	**51%**	15%	32%	37%	14%	2%
12.	Solar power	**68%**	**31%**	22%	46%	22%	9%	1%
13.	Wind power	**73%**	**26%^**	23%	50%	18%	9%	1%
14.	Hydro power	**48%**	**47%^**	4%	44%	34%	12%	5%
15.	Geothermal or ground source heat pumps	**46%^**	**47%**	5%	42%	34%	13%	6%
16.	Waste to Energy Conversion	**54%**	**39%**	14%	40%	29%	10%	6%

Summary of Future Energy Source Usage - Ranked By % One of Biggest Sources

Energy Source	% One of Biggest Sources	% Total Biggest/ Significant Source
Natural gas	**26%**	**75%**
Wind power	**23%**	**73%**
Solar power	**22%**	**68%**
Nuclear	**15%**	**47%**
Waste to Energy Conversion	**14%**	**54%**
Coal	**10%**	**43%**
Geothermal or ground source heat pumps	**5%**	**46%**
Hydro power	**4%**	**48%**

Next, I am going to read you some terms people might hear when energy is discussed. Please tell me whether each term sounds positive or negative to you. I am not asking you to define or explain the term, just tell me whether the term has a positive or negative ring or feeling to it when you hear it. We will use a scale of one to ten, where one means VERY NEGATIVE and ten means VERY POSITIVE. Five on this scale means neither positive nor negative.
(IF NOT SURE, CODE AS: DON'T KNOW/REFUSED, 99)

The first/next one is...**(RANDOMIZE)**

		10	**8-10**	**5-7**	**1-4**	**DK/REF**	**MEAN**
17.	Energy efficiency	49%	79%	18%	3%	–	8.6
18.	Energy conservation	41%	66%	29%	5%	–	8.1
19.	Energy security	26%	47%	43%	10%	*	7.1
20.	Energy independence	41%	63%	32%	4%	*	8.0

Summary of Energy Terms - Ranked By %10

Energy Terms	%10	%8-10	Mean
Energy efficiency	**49%**	**79%**	**8.6**
Energy conservation	**41%**	**66%**	**8.1**
Energy independence	**41%**	**63%**	**8.0**
Energy security	**26%**	**47%**	**7.1**

SPLIT SAMPLED, N=249

21. And, do you think that increasing the use of renewable energy sources like wind and solar power would **(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)**

72%	CREATE NEW JOBS IN OUR AREA
19%	NOT AFFECT JOBS IN OUR AREA
5%	COST JOBS IN OUR AREA
3%	DON'T KNOW **(DO NOT READ)**
*	REFUSED **(DO NOT READ)**

SPLIT SAMPLED, N=251

22. Do you think that measures to conserve energy or improve energy efficiency would **(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)**

69%	CREATE NEW JOBS IN OUR AREA
19%	NOT AFFECT JOBS IN OUR AREA
10%	COST JOBS IN OUR AREA
2%	DON'T KNOW **(DO NOT READ)**
*	REFUSED (**DO NOT READ)**

Next, I would like to read some ideas related to energy that might be considered by the City or energy utilities in the next few years. For each one, please rate the importance of each proposal. As you respond, please keep in mind that not every idea can be a top priority.

The first/next one is...**(READ STATEMENT)**...And do you think this proposal should be an absolute top priority, a high but not top priority, a medium priority, or a lower priority or do you think this should not be a priority?

	TOTAL TOP/ HIGH	TOTAL LOWER/ NOT	TOP PRIORITY	HIGH PRIORITY	MEDIUM PRIORITY	LOWER PRIORITY	NOT A PRIORITY	DK/ REF (DNR)
Q23-26 SPLIT SAMPLED, N=249								
23. Provide incentives for developers to protect existing mature trees and plant new ones that provide shade and reduce the need to cool homes and buildings in the summer.	**59%**	**11%^**	18%	41%	30%	6%	4%	*
24. To help reduce the need to drive, promote development where housing, businesses, and shopping are all built in close proximity to each other.	**31%^**	**26%**	6%	24%	42%	16%	10%	1%
25. Provide incentives for developers and builders to incorporate energy efficiency or renewable energy features in a development.	**57%**	**11%**	16%	41%	31%	7%	4%	2%
26. Establish express lanes for buses, carpooling, and hybrids during peak hours of traffic and, where feasible, reduce the number of car lanes to create wider sidewalks and provide bike lanes.	**28%^**	**33%**	5%	22%	39%	20%	13%	*
Q27-30 SPLIT SAMPLED, N=251								
27. Require new developments to protect existing mature trees and plant new ones that provide shade and reduce the need to cool homes and buildings in the summer.	**63%**	**11%**	23%	40%	26%	8%	3%	–
28. Modify the city zoning code to require more compact development where housing, businesses, and retail are all built in close proximity to each other.	**19%**	**41%**	3%	16%	39%	23%	18%	1%
29. Require all new subdivisions to incorporate a minimum number of energy efficiency or renewable energy features in buildings.	**54%**	**17%**	17%	37%	29%	11%	6%	*
30. Invest in alternative transportation options, increasing the availability and frequency of buses and improving the cities bike and pedestrian trails and amenities to increase transit ridership, biking and walking.	**45%**	**19%**	18%	27%	35%	13%	6%	*

Summary of Proposals - Ranked By % Top Priority

Proposals	% Top Priority	% Total Top/High Priority
Require new developments to protect existing mature trees and plant new ones that provide shade and reduce the need to cool homes and buildings in the summer.	**23%**	**63%**
Provide incentives for developers to protect existing mature trees and plant new ones that provide shade and reduce the need to cool homes and buildings in the summer.	**18%**	**59%**
Invest in alternative transportation options, increasing the availability and frequency of buses and improving the cities bike and pedestrian trails and amenities to increase transit ridership, biking and walking.	**18%**	**45%**
Require all new subdivisions to incorporate a minimum number of energy efficiency or renewable energy features in buildings.	**17%**	**54%**
Provide incentives for developers and builders to incorporate energy efficiency or renewable energy features in a development.	**16%**	**57%**
To help reduce the need to drive, promote development where housing, businesses, and shopping are all built in close proximity to each other.	**6%**	**31%**
Establish express lanes for buses, carpooling, and hybrids during peak hours of traffic and, where feasible, reduce the number of car lanes to create wider sidewalks and provide bike lanes.	**5%**	**28%**
Modify the city zoning code to require more compact development where housing, businesses, and retail are all built in close proximity to each other.	**3%**	**19%**

31. Which one of the following do you think is the best reason to SUPPORT proposals to improve energy efficiency and increase our use of renewable energy here in Omaha? **(RANDOMIZE)**

26% To have a more reliable, independent energy future
24% To save residents money in the long term by becoming more energy efficient
22% To increase our use of cleaner energy sources like wind and solar power
15% To reduce the use of dirtier energy sources like coal and oil
7% To reduce health problems from poor air quality

1% OTHER/NONE OF THESE
3% ALL/COMBINATION

1% UNSURE **(DO NOT READ)**
1% REFUSED **(DO NOT READ)**

Today, less than one percent of the city's energy needs are met by renewable energy sources like solar and wind. Some proposals to increase renewable energy sources might result in slightly higher costs in the short-term for energy.

32. What is the most you would be willing to pay in higher energy prices per month to increase the amount of our energy needs which are met by renewable energy sources like wind and solar power? **(READ IN ORDER - STOP AT AMOUNT)**

22% More than 10 dollars
28% 10 dollars
22% 5 dollars
12% 1 dollar
...OR...
9% 50 cents

3% LESS THAN THAT **(DO NOT READ)**
2% NONE/OPPOSE INCREASE **(DO NOT READ)**
2% UNSURE/REFUSED **(DO NOT READ)**

50% ***$10 OR MORE***
49%^ ***$5 OR LESS***

SPLIT SAMPLED, N=249

33. When buying energy saving appliances or light bulbs, these products often cost more but save money in the long run through lower utility bills. How quickly would you need to make up this extra purchase cost to be willing to buy the more efficient products? **(READ IN ORDER - STOP AT AMOUNT)**

10% Immediately
38% Within 1 year
25% Within 2-3 years
23% You would consider making the more expensive purchase even if it took several years to make up the difference
3% Would not purchase/Can't wait for savings/Oppose increase **(DO NOT READ)**

1% DOES NOT MATTER SHOULD BUY EQUIPMENT THAT IS MORE ENERGY EFFICIENT **(OR OTHER REASON) (DO NOT READ)**
1% UNSURE/REFUSED **(DO NOT READ)**

48% 1 YEAR OR SOONER
50%^ 2-3 YEARS OR LONGER

SPLIT SAMPLED, N=251

34. Implementing programs the improve energy efficiency in homes, local industries, and office buildings might result in slightly higher costs in the short-term for energy. What is the most you would be willing to pay in higher energy prices per month to invest in energy efficiency technologies that reduce our long term energy needs? **(READ IN ORDER - STOP AT AMOUNT)**

17% More than 10 dollars
21% 10 dollars
24% 5 dollars
19% 1 dollar
...OR...
16% 50 cents

1% LESS THAN THAT **(DO NOT READ)**
2% NONE/OPPOSE INCREASE **(DO NOT READ)**
* UNSURE/REFUSED **(DO NOT READ)**

38% $10 OR MORE
62% $5 OR LESS

For each of the following actions, please tell me how interested you would be in learning more so you and your household could participate in the action -- Would you be very interested, somewhat interested, only a little interested, or not interested at all - **(RANDOMIZE)**

	TOTAL VERY SMWT	TOTAL LITTLE/ NOT	VERY INTEREST	SMWT INTEREST	ONLY A LITTLE INTEREST	NOT INTEREST	DK/REF (DNR)
Q35-36 SPLIT SAMPLED, N=249							
35. In a program where trained experts inspect your home for ways to make your home more energy efficient and help facilitate the logistics of contracting the work.	**64%**	**35%**	22%	42%	17%	18%	*
36. In being given the choice to buy electricity identified to come from renewable energy sources like wind, solar, or hydropower even if it meant a 1 to 5% increase in your rates.	**64%**	**36%**	25%	39%	18%	18%	–
Q37-38 SPLIT SAMPLED, N=251							
37. In receiving rebates for weatherization to make your home more energy efficient.	**66%**	**33%**	39%	27%	15%	18%	1%
38. In City programs to work with businesses to identify opportunities to improve energy efficiency or integrate renewable energy like solar panels into buildings.	**47%**	**52%**	17%	30%	22%	30%	1%

Summary of Actions - Ranked By % Very Interested

Actions	% Very Interested	% Total Very/ Somewhat Interested
In receiving rebates for weatherization to make your home more energy efficient.	**39%**	**66%**
In being given the choice to buy electricity identified to come from renewable energy sources like wind, solar, or hydropower even if it meant a 1 to 5% increase in your rates.	**25%**	**64%**
In a program where trained experts inspect your home for ways to make your home more energy efficient and help facilitate the logistics of contracting the work.	**22%**	**64%**
In City programs to work with businesses to identify opportunities to improve energy efficiency or integrate renewable energy like solar panels into buildings.	**17%**	**47%**

39. Changing topics, from what you know about climate change, which of the following four statements is closest to your opinion? **(ROTATE TOP TO BOTTOM, BOTTOM TO TOP)**

25% Climate change has been established as a very serious problem, and strong, immediate measures are necessary.
28% There is enough evidence that climate change is taking place and some action should be taken.
26% We do not know enough about climate change, and more research is necessary before we take strong actions.
20% Concern about climate change has been exaggerated, and no action is needed.

1% DON'T KNOW **(DO NOT READ)**
– REFUSED **(DO NOT READ)**

52%^ TAKE ACTION
46% DO NOT TAKE ACTION

For statistical purposes only –

D1. In what year were you born?

20% 18 to 34
25% 35 to 44
15% 45 to 54
20% 55 to 64
18% 65 and over

2% REFUSED **(DO NOT READ)**

D2. What was the last level of education you COMPLETED? **(DO NOT READ CATEGORIES)**

19% GRADUATED HIGH SCHOOL OR LESS
3% TECHNICAL OR VOCATIONAL SCHOOL
19% SOME COLLEGE
36% GRADUATED COLLEGE
23% GRADUATE/PROFESSIONAL SCHOOL

* REFUSED **(DO NOT READ)**

19% HIGH SCHOOL OR LESS
22% SOME COLLEGE
59% COLLEGE+

D3. No matter how you feel today, are you registered to vote as... **(ROTATE)** a Republican, a Democrat, or something else?

35% REPUBLICAN
43% DEMOCRAT
20% SOMETHING ELSE/INDEPENDENT

2% REFUSED **(DO NOT READ)**

D4. And for statistical purposes only...is your total annual household income greater or less than $60,000 dollars?

6% UNDER $20,000
16% BETWEEN $20,000 - $40,000
15% BETWEEN $40,000 - $60,000
15% BETWEEN $60,000 - $80,000
16% BETWEEN $80,000 - $100,000
20% OVER $100,000

12% REFUSED **(DO NOT READ)**

23%^ UNDER $40,000
30% $40,000-$80,000
36% OVER $80,000

D5. Gender **(BY OBSERVATION)**

48% MALE
52% FEMALE

COMPLETION PROJECTIONS BASED ON AVAILABLE INCENTIVE FUNDS

Date: September 13, 2012

Created by: Kristi Wamstad-Evans

Projected completion based on average expenditure; includes existing completions

Residential		to 9/11	@ $2500 per	@ $3000 per	@ $3500 per	@ $4000 per	@ $5000 per	@ $7500 per	$10,500 per
Omaha	MR	78	567	486	428	384	323	241	195
	LM	19	409	344	298	263	214	149	112
	Total	**97**	**977**	**830**	**725**	**647**	**537**	**390**	**306**
Lincoln	MR	10	352	295	254	224	181	124	91
	LM	8	202	170	147	129	105	73	54
	Total	**18**	**554**	**465**	**401**	**353**	**286**	**197**	**146**
Combined		**115**	**1,530**	**1,294**	**1,126**	**1,000**	**823**	**587**	**452**

Commercial		to 9/11	@ $2500 per	@ $3000 per	@ $3500 per	@ $4000 per	@ $5000 per	@ $7500 per	$10,500 per
OMA	C/NP	6	299	250	215	189	152	104	76
LNK	C/NP	4	147	123	106	93	76	52	38
Combined		**10**	**446**	**373**	**321**	**282**	**228**	**155**	**114**

* projected numbers based on remaining funds and a per participant average incentive amount, including evaluation and upgrade incentives