

Kentucky Power Company
KPSC Case No. 2025-00365
Joint Intervenors' Post-Hearing Set of Data Requests
Dated July 6, 2026
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DATA REQUEST

JI PHDR_1 Please refer to the hearing testimony of Company Witness Stevi Cobern at HVT 9:29:00 to 9:33:30 a.m., and provide or explain:

- a. The name and other identifying information of any subcontractor(s) performing work under HEIP;
- b. The name and other identifying information for any other subcontractor(s) of TRC performing work under any other tariff at issue in this case;
- c. Copies of any currently effective contracts between the Company and its contractor, TRC, related to the Company's DSM programs;
- d. Copies of any currently effective contracts between agents or contractors of the Company, including TRC, and any subcontractors performing work under any tariff at issue in this case;
- e. How did TRC retain any subcontractors? E.g., was a request for proposals ("RFP") issued? Please provide any such RFP, and any responses; and
- f. How many staff of administrator/contractor and implementer/subcontractor work full time on programs under the tariffs at issue in this case.

RESPONSE

a. and b. TRC has one subcontractor for HEIP: Earth Right Mid Atlantic (Earth Right). Earth Right conducts the home energy assessment and completes the direct install measures during the assessment.

Earth Right Mid-Atlantic
<https://earthright.com>
52 Beechwood Drive
Lynchburg, Va 24502
434-505-4590
Corey Argentino, CEO

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c. and d. Please see KPCO_R_KPSC_PHDR_15_ConfidentialAttachment1 and KPCO_R_KPSC_PHDR_17_ConfidentialAttachment1.

e. TRC selects subcontractors based on work history from previous TRC projects because the Statement of Work and pricing are set based on approved program filing.

f.

TRC	FTE
Management	.32 FTE
Operations/Processing/Call Center	.85 FTE
Finance/Invoicing	.05 FTE
Outreach/ QAQC	1.25 FTE
Marketing	.55 FTE
IT Data Tracking/Reporting	.25 FTE
Engineering	.08 FTE

Earth Right Mid Atlantic	FTE
Management	.10 FTE
Finance/Invoicing	.35 FTE
Operations/Field Management	.75 FTE
Operations Support /Scheduling	.50 FTE
Field Operations/Assessments/Installs	1.75 FTE

Witness: Stevi N. Cobern

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DATA REQUEST

JI PHDR_2 Please refer to the hearing testimony of Company Witness Stevi Cobern at 9:31:30 to 9:33:20 a.m., 9:38:00 to 9:48:00 a.m., 10:14:30 to 10:17:20 a.m., and provide or explain:

a. Each monthly update on program implementation provided by TRC not previously provided in the record in this case. If updates have not been provided on a monthly basis, please explain why not and provide each update from TRC;

b. Are trade allies eligible to receive direct rebates from the Company for installation of eligible measures?

c. Are non-trade ally contractors eligible to receive direct rebates from the Company for installation of eligible measures?

d. Explain in full the specific benefits) of becoming a trade ally?

e. Provide the total number of ratepayers who received audits by month under i. HEIP, and ii. CESP;

f. Is there a standardized checklist or form utilized by auditors under either HEIP, or CESP? If so, please produce a copy of each such standardized checklist of form. If not, please explain why not.

g. Is there a standardized reporting form utilized by auditors to record the installation of direct measures and recommendations provided to the participating customer by the auditor? If so, please produce a copy of the reporting form(s), and explain how information collected from those reporting forms is provided the Company. If not, please explain why not

h. The total number of ratepayers who received direct installs of measures by month under i. HEIP, and ii. CESP;

i. Identify the direct install measures received by each participant to date in 2026 under i. HEIP, and ii. CESP;

j. The total number of ratepayers or trade allies who received rebates and measures rebated by month under i. HEIP, and ii. CESP;

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- k. The total number of ratepayers by month in the “pipeline” for i. HEIP, and ii. CESP;
- l. The targeted kWh savings under i. HEIP, and ii. CESP;
- m. The amount of kWh savings achieved, and explanation of how this amount was calculated; and
- n. Does TRC track measures installed during audits? Please provide any such tracking information, or explain why tracking is not done.

RESPONSE

- a. Kentucky Power and TRC meet on a regular basis. During these meetings, TRC provides regular status updates. Additionally, TRC responds to ad hoc data requests from Kentucky Power. A monthly update is also presented and provided to Kentucky Power following the monthly standing meeting. Please see KPCO_R_JI_PHDR_2_Attachment1 for all meeting presentations.
- b. Yes, trade allies can receive direct rebate payments from the Company (fulfilled by program implementer TRC after receipt of funds from the Company). Customers select their preference between receiving the rebate or having it issued direct to the trade ally when completing the application.
- c. Yes, non-trade allies can receive direct rebate payments from the Company (fulfilled by program implementer TRC after receipt of funds from the Company). Customers select their preference between receiving the rebate or having it issued direct to the trade ally when completing the application.
- d. Benefits of becoming a trade ally include:
 - Program Website: Participating trade allies are listed on the program website of professionals the residential and business customers can employ for energy efficient updates for their home or business.
 - Increased Exposure: Access to a broad base of customers eager to engage in energy-efficiency projects for their homes or businesses.

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- Support and Resources: Availability of marketing materials and technical resources.
- Training: Training webinars offered to trade allies for program and industry updates.

e. The chart below provides the number of home energy assessments for the HEIP program by month for 2025 and through June 2026.

Year	Month	Number of Home Assessments
2025	September	6
	October	0
	November	7
	December	6
2026	January	11
	February	17
	March	37
	April	46
	May	23
	June	10
	Total	163

The chart below shows the number of CESP assessments by month for 2025 and through June 2026.

Year	Month	CESP Assessments
2025	September	1
	October	2
	November	3
	December	6
2026	January	7
	February	2
	March	0
	April	4
	May	0
	June	1
	July	1
	Total	27

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f. Yes, TRC uses a standardized checklist for both HEIP and CESP. Please see KPCO_R_JI_PHDR_2_Attachment2.

g. Yes, there is a standard form used in the field, and the installed measure data is entered into the project record for reporting and invoicing. For a copy of the form used in the field, please see KPCO_R_JI_2_Attachment2 and a copy of the customer report is provided as KPCO_R_JI_PHDR_2_Attachment3.

h. Direct-install energy efficiency measures were provided to all customers who participated in a home energy assessment. Please see the chart above in response to subpart (e.) for the total number of customers. CESP is not a direct-install program.

i. Please see KPCO_R_JI_PHDR_2_Attachment4 for HEIP participants. CESP is not a direct-install program.

j. Please see the chart below for HEIP direct-install and rebates by month.

EnergyAdvantage at Home Direct Install and Rebate Invoiced 2026

	Direct Install			Rebate			Grand Total		
	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives
Jan	11	19,538	\$7,370	8	17,298	\$4,450	19	36,836	\$11,820
Feb	7	12,915	\$4,333	2	13,979	\$730	9	26,894	\$5,063
Mar	44	80,052	\$28,580	0	0	\$0	44	80,052	\$28,580
Apr	17	27,903	\$10,523	0	0	\$0	17	27,903	\$10,523
May	32	64,156	\$19,485	0	0	\$0	32	64,156	\$19,485
Jun	27	57,837	\$17,764	1	3,800	\$230	28	61,637	\$17,994
Jul	0	0	\$0	0	0	\$0	0	0	\$0
Aug	0	0	\$0	0	0	\$0	0	0	\$0
Sep	0	0	\$0	0	0	\$0	0	0	\$0
Oct	0	0	\$0	0	0	\$0	0	0	\$0
Nov	0	0	\$0	0	0	\$0	0	0	\$0
Dec	0	0	\$0	0	0	\$0	0	0	\$0
Total	138	262,400	\$88,054	11	35,078	\$5,410	149	297,478	\$93,464
2026 Goal								539,305	\$217,383
% Achieved								55%	43%

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The below chart provides CESP projects invoiced by month.

CESP Projects - Invoiced		
2025	July	0
	August	0
	September	0
	October	0
	November	4
	December	3
2026	January	4
	February	4
	March	1
	April	0
	May	5
	June	3
	July	2

k. The following charts include requests for home energy assessments by month; however, these may or may not become a pipeline project based on continued interest or scheduling. Additionally, pipeline projects do not necessarily finalize or invoice the following month.

HEIP Requests			CESP Pipeline		
2025	July	6	2025	July	0
	August	21		August	0
	September	5		September	1
	October	22		October	2
	November	23		November	6
	December	31		December	4
2026	January	7	2026	January	2
	February	42		February	3
	March	23		March	1
	April	13		April	7
	May	6		May	3
	June	33		June	3
	July	34		July	0

l. The targeted kWh savings are 605MW and 2,967 for HEIP and CESP respectively in 2026. These are unchanged from those provided in Case No. 2024-00115.

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m. For the HEIP, the annual energy savings from TRC for each energy efficiency measure are calculated and summed up to determine the total annual energy savings of each project. Technical Reference Manuals ("TRMs"), are utilized to reference energy savings calculations for common energy efficiency measures that have been approved for use in energy efficiency ("EE") programs. In this program, the Illinois TRM v13 Vol. 3 is referenced for residential EE measures. For certain direct-install measures such as faucet aerators, weatherstripping, and advanced power strips, deemed savings values are provided by the TRM to estimate annual savings. For other measures, project-specific information such as existing home characteristics and efficiency of installed equipment is used as inputs to the TRM-based equations to measure energy savings.

HEIP Program Year	kWh Goal	kWh achieved	% of Goal Achieved
2025	192,609	33,334.39	17%
2026	539,305	312,279.21	58%
as of 7.1.26			

For the CESP program, the annual energy savings provided by TRC for each EE measure are calculated and summed up to determine the total annual energy savings of each project. The Illinois TRM v13 Vol. 2 is referenced for commercial EE measures. Project specific information is used to calculate the estimated energy savings of each measure. For lighting projects, this includes the quantity of lamps or fixtures, existing lighting wattage, and proposed lighting wattage. For HVAC measures, this includes the quantity, size, and efficiency of new equipment. Operating hours used in the calculations are based on TRM reference tables providing typical operating schedules of different building types.

CESP Program Year	kWh Goal	kWh achieved	% of Goal Achieved
2025	1,269,774	241,285.91	19%
2026	2,947,015	1,373,745.15	47%
as of 7.1.26			

n. Yes, installed measures are tracked during home energy assessment direct-install customer visits for the HEIP program. Please see KPCO_R_JI_PHDR_2_Attachment4.

Witness: Ryan L. Lake



ENERGY ADVANTAGE

Monthly Meeting - October 20, 2025



SAVING ENERGY STARTS HERE

Agenda

- Safety Moment
- Meet the Team
- Program Highlights
- Program Update
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Operations
- Marketing
- Wrap Up

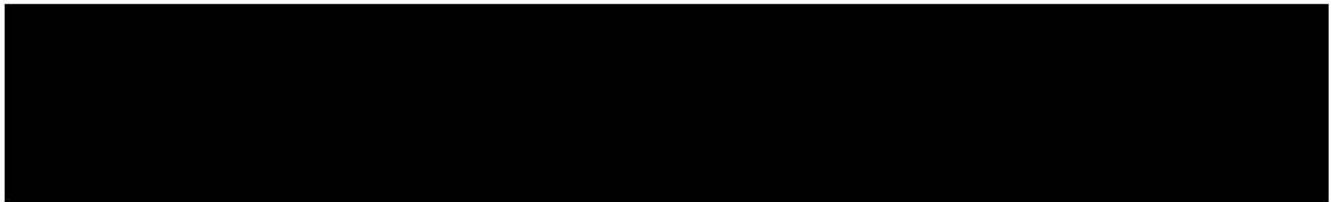


Safety Moment



- Test your smoke alarms monthly to ensure they're working properly
- Keep space heaters at least 3 feet away from anything that can burn
- Clean your dryer vents regularly to prevent lint buildup
- Inspect electrical cords for fraying or damage
- Use battery operated lights instead of candles in pumpkins

Meet the Team



Deborah Hill
Program Director

Fran Phillips
Operations Manager

Patricia Reed
Operations

Peter Hynson
Project Engineer III

Issac Finn
Outreach



Laura Sagan
*Strategic
Deployment &
JumpStart*

Courtney Capshaw
Marketing Director

Erica Tieman
Sr. Marketing Manager

Jennifer Voss
Marketing Coordinator

Incentive Invoicing

October 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November 2025						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December 2025						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			



ENERGY ADVANTAGE AT HOME

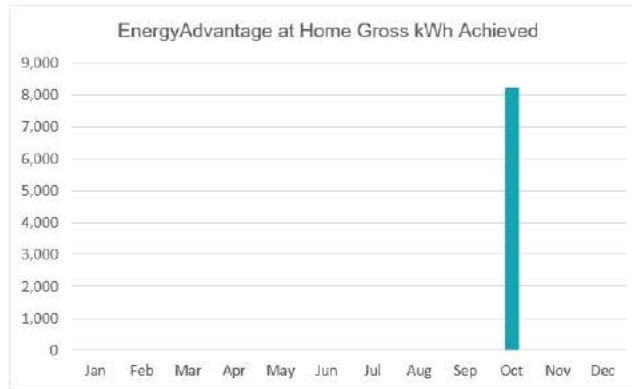


SAVING ENERGY STARTS HERE

Completed EnergyAdvantage At Home Projects

EnergyAdvantage At Home

4%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	8,224	192,609	4%	\$4,414	\$ 68,513	6%
2025 Pipeline	0	192,609	0%	\$0	\$ 68,513	0%
2025 Total	8,224	192,609	4%	\$ 4,414	\$ 68,513	6%

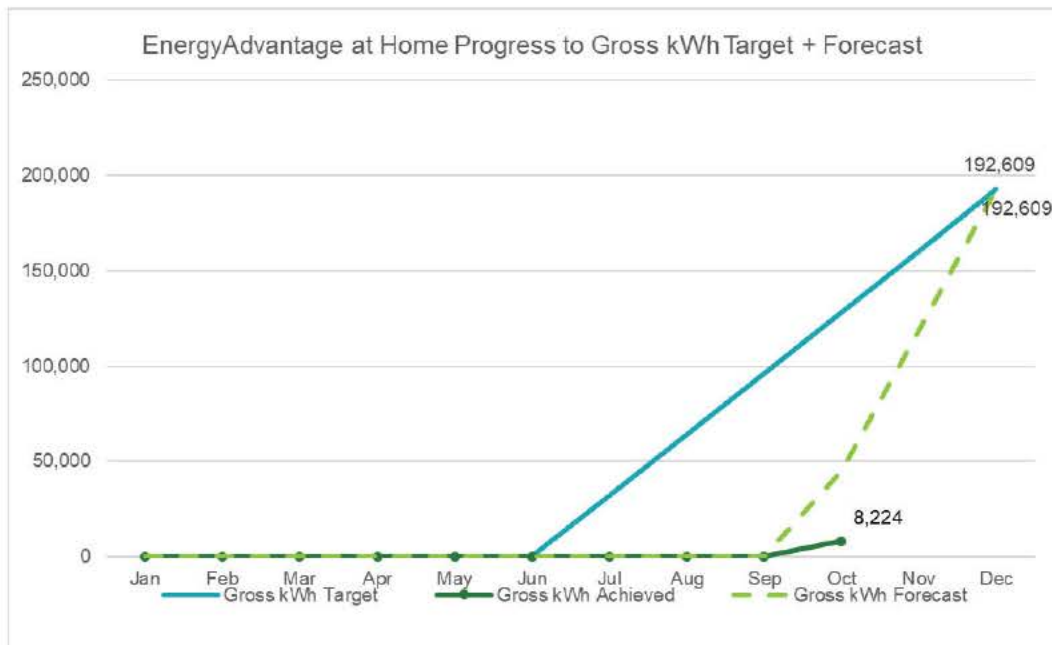
Projects Completed
6

Avg. Gross kWh
1,371

Avg. Incentives
\$736

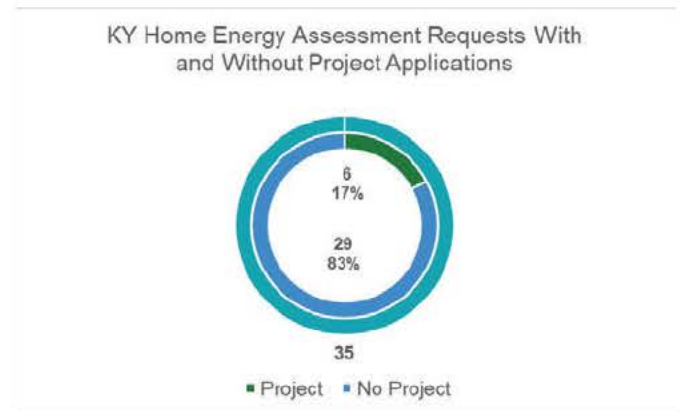
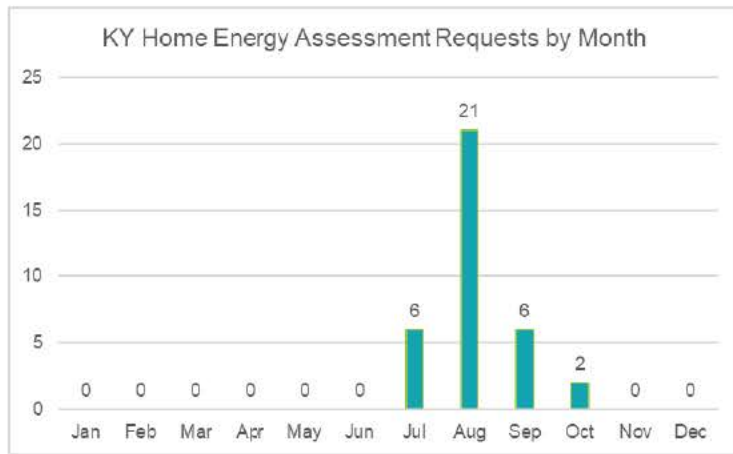
Avg. \$/Gross kWh
\$0.54

EnergyAdvantage At Home Program



- Approximately 140 Home Energy Assessments in 2025 will meet goal (based on 1371 avg. kWh per home)
- Outreach to high energy usage customers
- Continue to blanket the area with program collateral

EnergyAdvantage At Home Program



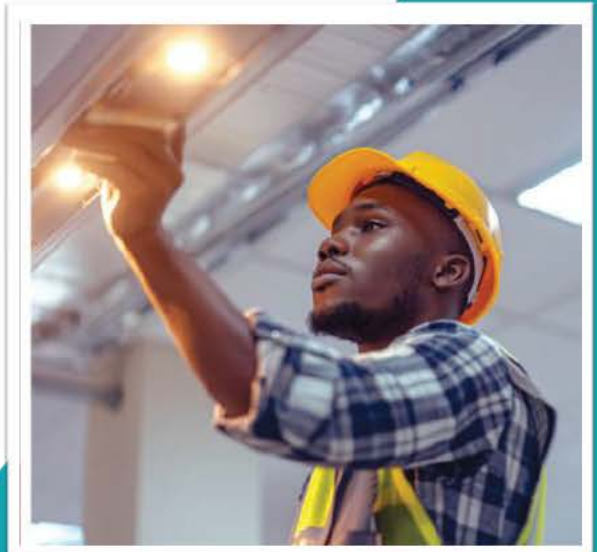
Home Energy Assessment Updates



- Earth Right
 - Subcontractor for Home Energy Assessments
- Applications
 - 35 Home Energy Assessment Submitted
 - 6 Completed
 - 7 Scheduled
 - 22 in process of scheduling

Rebates

- 1 rebate application submitted
- 13 applications initiated- Researching
- Increase expected as rebate measures are recommended during Home Energy Assessments





An **AEP** Company

ENERGY ADVANTAGE FOR BUSINESS

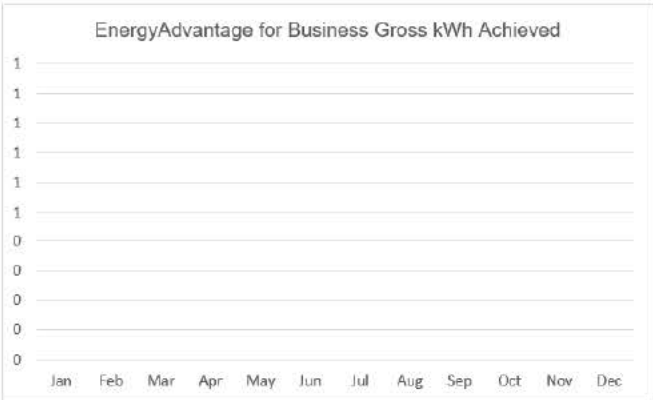


SAVING ENERGY STARTS HERE

EnergyAdvantage For Business Program

EnergyAdvantage for Business

0%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	0	1,269,774	0%	\$0	\$ 130,444	0%
2025 Pipeline	0	1,269,774	0%	\$0	\$ 130,444	0%
2025 Total	0	1,269,774	0%	\$ -	\$ 130,444	0%

Projects Completed

Avg. Gross kWh

Avg. Incentives

Avg. \$/Gross kWh

EnergyAdvantage For Business Program



[REDACTED]

Lighting Leads

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

EnergyAdvantage For Business Program- Customer Meetings



September 2025						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

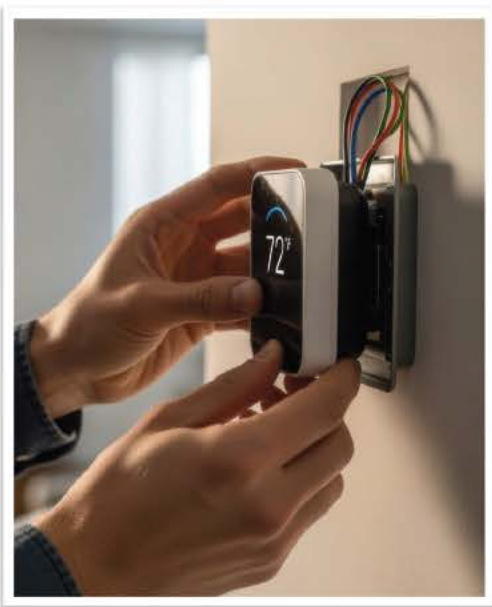
October 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Green in person
Black by phone

- 9/29- [REDACTED]
- 9/29- [REDACTED]
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- 10/16- [REDACTED]
- 10/17- [REDACTED]
- 10/17- [REDACTED]
- 10/20- [REDACTED]

HVAC - Coming January 2026!



- Commercial AC
- Heat Pumps
- Heat Pump Water Heater
- Smart Thermostats

In Process

- Captures Updates - new Measures
- Collateral to advertise addition of HVAC

Captures

- TRC's project management system
- Houses Kentucky Power customer data
- Connected to the program application portals
- Track leads, applications, projects, sites, QA/QC, payments, contractors, trade allies
- Customizable program dashboards
- Milestone driven
- Role based access

- **Captures Overview October 21 at 11am**
 - Sarah Nusbaum
 - Ryan Lake

The screenshot displays two overlapping tables from the TRC project management system. The top table, titled 'HP OLA - Assessment Requested - TA Assigned - HEA Scheduled', lists project details with columns for HP Request Date, Application ID, Name, Program, Sub-Program, Source Origin, Application Status, and TA. The bottom table, titled 'Project Lead', lists project details with columns for Project Lead ID, Project Type, Project Lead Description, Program, Sub-Program, Last Touch Date, and Next Follow Up.

HP Request Date	Application ID	Name	Program	Sub-Program	Source Origin	Application Status	TA
7/1/2025	HEA_0000000	0000000 Englebert Andrae	HP	Direct Install	Moderate m...	HP Request Sub...	
7/8/2025	HEA_1000000	1000000 Kentucky & armen	HP	Direct Install	Standard m...	HP Request Sub...	

Project Lead ID	Project Type	Project Lead Description	Program	Sub-Program	Last Touch Date	Next Follow Up
PL_2213	Lighting	Vinton location - interior/exterior lighting LED upgrade	BES	Commercial	7/30/2025	7/15/2025
PL_2250	Lighting	Millington location - lighting upgrade Qty 90 metal hoods...	BES	Commercial	2/12/2025	2/1/2025
PL_2115	Add-On	Upgrades to Coolers - phase 1 (2025 completion)	COP	Custom	7/1/2025	7/15/2025
PL_2251	Lighting	Vinton location - LED to LED lighting upgrade - metal hoods...	COP	Custom	7/1/2025	7/1/2025
PL_2291	Lighting	Buzzell County Industrial Development Authority - lighting	BES	Commercial	7/1/2025	1/12/2025
PL_1717	New Controls	Clatsop Chiller/EC Motors on CBAC Units - New Controls...	COP	Custom	6/26/2025	6/1/2025
PL_1728	Lighting	LED lighting	BES	Commercial	6/24/2025	6/24/2025

Trade Ally Outreach Strategies



- October 9- Trade Ally Webinar- 11 attendees
- Notify active commercial Trade Allies participating in other programs
- Engage with new Trade Allies identified in Kentucky that perform eligible services
- Share Enrollment Guide with industry associations
- Attend industry events

Trade Ally Process

- Trade Ally Application submitted
- TRC reviews for eligibility and required documents
 - Insurances
 - W9
- TRC holds a program orientation with Trade Ally
- Applications In Review



Marketing Update – Program

• Program Collateral

- Incentive guides: designed, approved, printed, added to website
- One pagers: designed, approved, printed
- Program Overview flyers: designed, approved, printed
- HEA Half pager: design drafted, sending for approval this week



Marketing Update - Campaigns

• Launch Materials

- **Social graphics:** designed, approved, and all sizes shared
- **Postcards:** designed, approved, print quote complete, scheduling send for HEA postcards with printer this week
 - *LIHEAP past participants postcard draft complete, pending send*
- **Emails:** being sent this week

• Campaign Materials:

- **Postcards:** content drafted for first postcard per program, designs pending
- **Emails:** content drafted for first 3 emails per program, designs pending, scheduling for November sends
- **Social graphics:** pending designs of other campaign materials



Marketing Update – Trade Allies/Contractors

• Trade Ally Recruitment

• Email: Complete

- designed, approved, and sent on September 24, 2025
- Sent: 182
- Opens: 90 (57%)
- Clicks: 29 (18%)

• Webinar: Complete

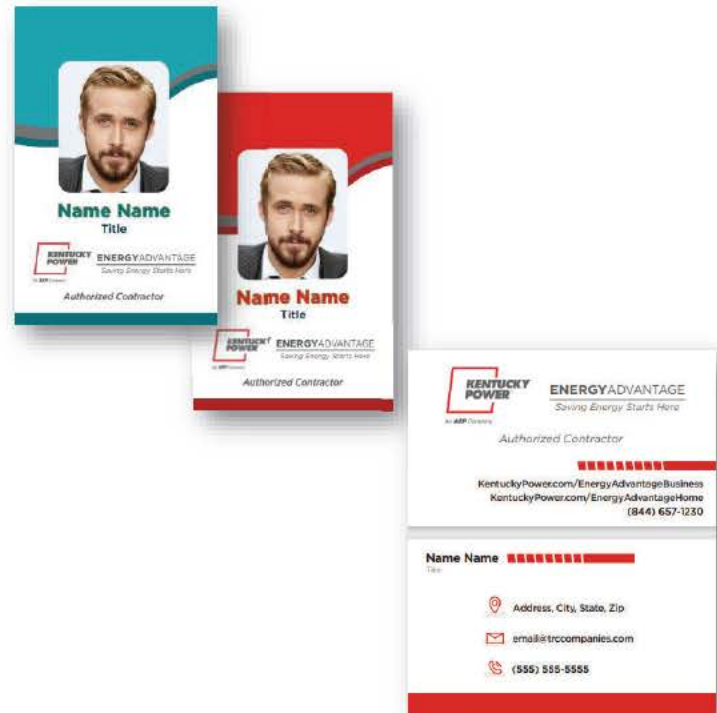
- Date: October 9, 2025, at 11 am
- Email invites: designed, approved and sent
- Presentation: content and design complete
- Registrations: 15
- Attendees: 11



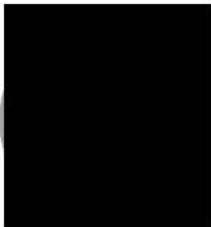
Marketing Update - Outreach

- **Program Outreach Materials**

- **PowerPoint Template:** designed, approved, in use
- **Name Badges:** designed, approved, printed/received
- **Business Cards:** designed, approved, order received
- **Clothing Items:** design and order pending



Program Contact Information



Issac Finn
Outreach

Phone: 859-417-2802

Email: ifinn@trccompanies.com

Program Phone: 844-657-1230

Program Email:
EnergyAdvantageKentucky@TRCcompanies.com





Thank You!



SAVING ENERGY STARTS HERE



ENERGY ADVANTAGE

EnergyAdvantage Update— November 6, 2025



SAVING ENERGY STARTS HERE

Agenda

- Safety Moment
- Meet the Team
- Program Update
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Operations
- Marketing
- Wrap Up



Safety Moment

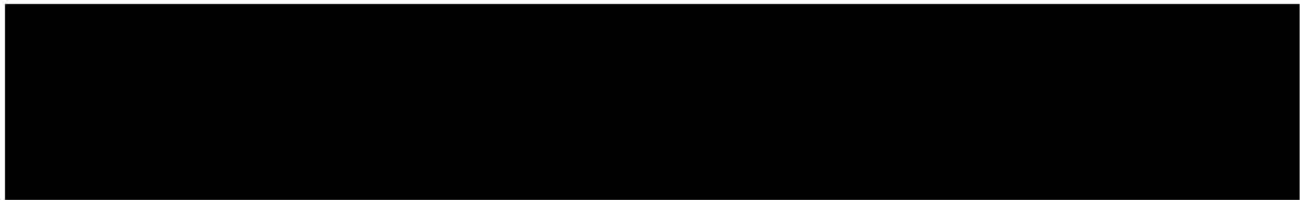
FALL BACK

Daylight Savings Time Ends



- Time change means more driving in the dark, less Daylight means less visibility, drive safely
- Adjust your sleep gradually, wake up earlier by 15- 20 minutes
- Get morning sunlight, exposing yourself to natural sunlight can help reset your internal clock.

Meet the Team



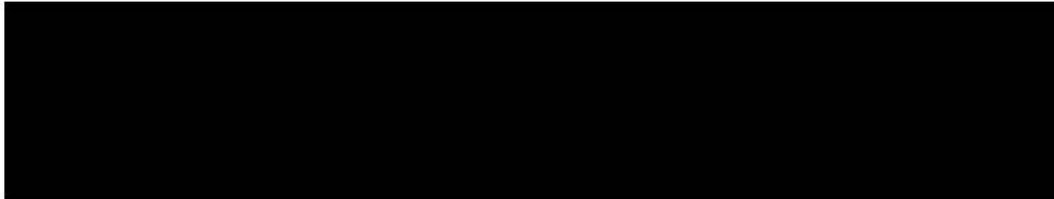
Deborah Hill
Program Director

Fran Phillips
Operations Manager

Patricia Reed
Operations

Peter Hynson
Project Engineer III

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Outreach



Laura Sagan
*Strategic
Deployment &
JumpStart*

Courtney Capshaw
Marketing Director

Erica Tieman
Sr. Marketing Manager

Jennifer Voss
Marketing Coordinator



ENERGY ADVANTAGE

AT HOME



SAVING ENERGY STARTS HERE

Home Energy Assessment Updates



- Earth Right
 - Subcontractor for Home Energy Assessments
- Applications
 - 53 Home Energy Assessment Requests
 - 6 Completed
 - 47 Scheduling & In Process of Scheduling

Completed EnergyAdvantage At Home Program

EnergyAdvantage At Home

4%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	8,224	192,609	4%	\$4,414	\$ 68,513	6%
2025 Pipeline	0	192,609	0%	\$0	\$ 68,513	0%
2025 Total	8,224	192,609	4%	\$ 4,414	\$ 68,513	6%

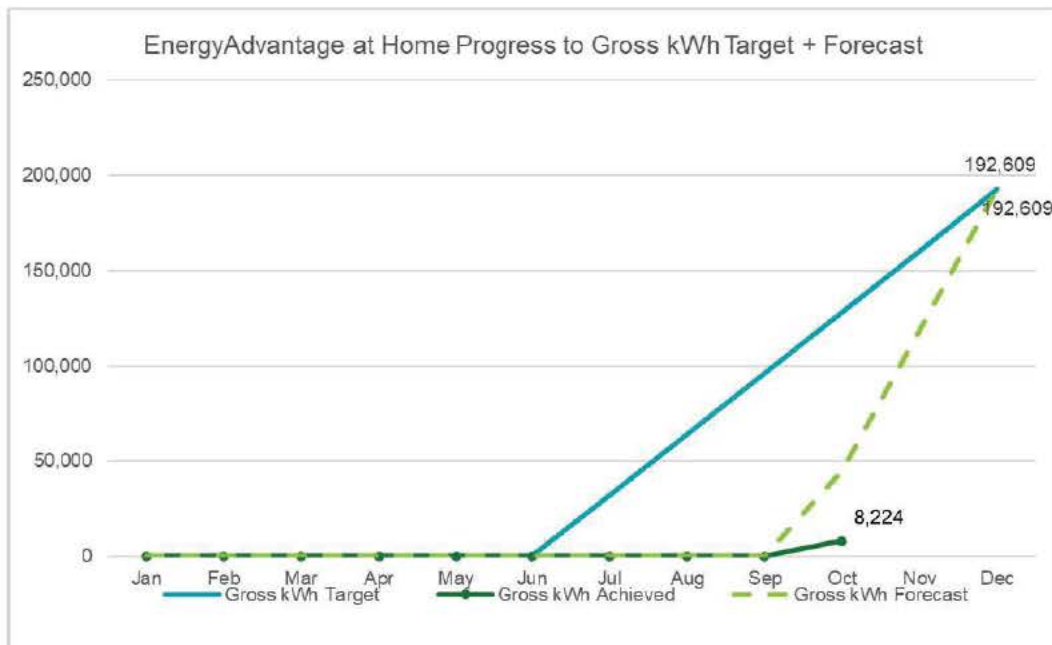
Projects Completed
6

Avg. Gross kWh
1,371

Avg. Incentives
\$736

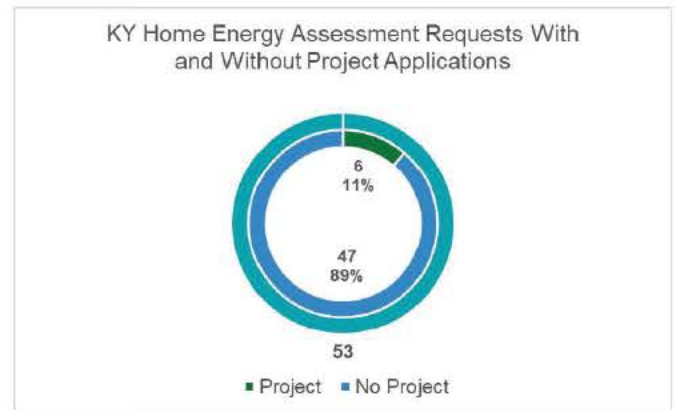
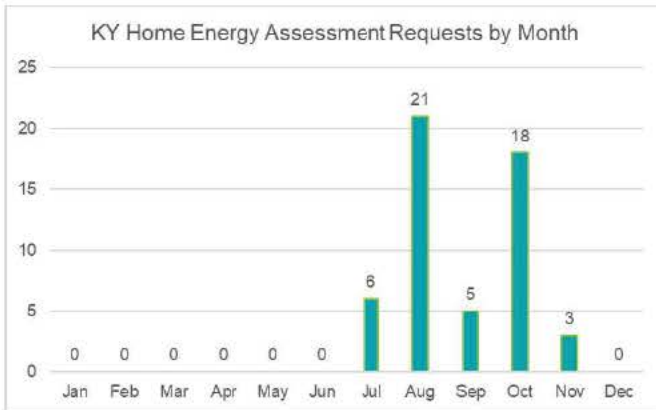
Avg. \$/Gross kWh
\$0.54

EnergyAdvantage At Home Program



- Approximately 140 Home Energy Assessments will meet goal (based on 1371 avg. kWh per home)
- 47 number of current request = 64,437 avg kWh
- Outreach to high energy usage customers
- Marketing by Kentucky Power and TRC – 7 times needed!
- Continue to blanket the area with program collateral

EnergyAdvantage At Home Program



Rebates

- 2 rebate application submitted
- 23 applications initiated
 - Reached out to customers to check in and answer questions. Follow-up again next week
- Increase expected as rebate measures are recommended during Home Energy Assessments



EnergyAdvantage for Home

October 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

- 10/9-
- 10/17-
- 10/22-
- 10/22-
- 10/22-
- 10/22-
- 10/22-
- 10/22-
- 10/23-
- 10/24-
- 10/24-
- 10/24-
- 10/24-
- 10/25-
- 10/25-
- 10/25-



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ENERGY ADVANTAGE FOR BUSINESS



SAVING ENERGY STARTS HERE

EnergyAdvantage For Business Program

EnergyAdvantage for Business

0%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	0	1,269,774	0%	\$0	\$ 130,444	0%
2025 Pipeline	7,659	1,269,774	1%	\$324	\$ 130,444	0%
2025 Total	7,659	1,269,774	1%	\$ 324	\$ 130,444	0%

Projects Completed

Avg. Gross kWh

Avg. Incentives

Avg. \$/Gross kWh



Colson Civic Center- Phase 1 (offices/initial hallway) – 7,659 kWh



Engagement Strategy

Frequent check-ins with relevant staff. Outreach with Director to ensure a complete understanding of program and opportunity – both savings and incentives



Customer's Problem

Need extra budget for additional projects, including more lighting.



Program Solution

Working with customer to submit application for lighting projects. Assisting with measures and incentives to maximize opportunity for locations.



Benefits

More lighting projects, more KWH saved. Incentive payouts to fund additional projects.

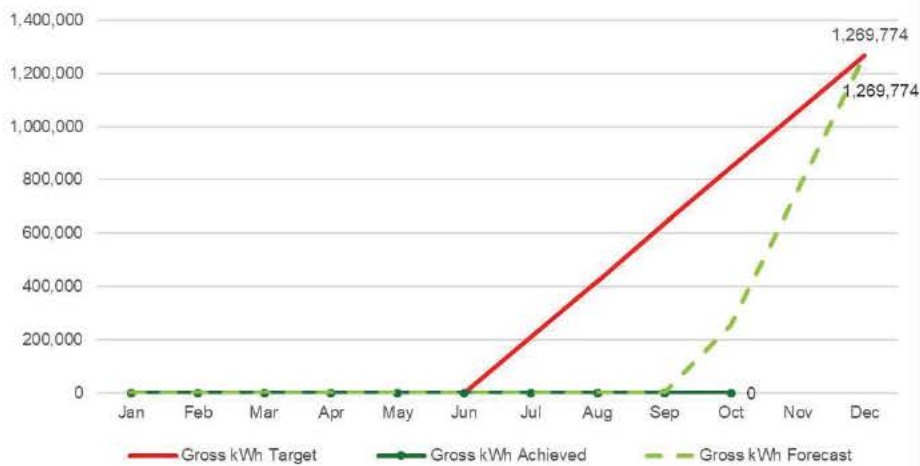


Opportunity

- Approx 1000 lights in process
- Estimated kWh savings: TBD
- Incentives: TBD
- Price per kWh: TBD

EnergyAdvantage For Business Program

EnergyAdvantage for Business Progress to Gross kWh Target + Forecast



- **Online Applications –**

- [REDACTED]

- **Project Opportunities (Leads) –**

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

EnergyAdvantage For Business Program- Customer Meetings

Green in person
Black by phone

October 2025						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

• 10/9-		• 10/23-	
• 10/9-		• 10/23-	
• 10/10-		• 10/23-	
• 10/10-		• 10/23-	
• 10/10-		• 10/24-	
• 10/10-		• 10/24-	
• 10/10-		• 10/24-	
• 10/14-		• 10/24-	
• 10/14-		• 10/24-	
• 10/15-		• 10/24-	
• 10/16-		• 10/24-	
• 10/16-		• 10/24-	
• 10/16-		• 10/24-	
• 10/16-		• 10/27-	
• 10/16-		• 10/27-	
• 10/17-		• 10/27-	
• 10/17-		• 10/27-	
• 10/20-		• 10/29-	
• 10/23-		• 10/30-	
• 10/23-		• 10/31-	

HVAC - Coming January 2026!



- Commercial AC Units
 - Split or packaged units
- Heat Pumps
 - Air-source and ground-source
 - Packaged terminal units (PTHPs)
- Heat Pump Water Heaters
- Smart Thermostats

In Progress

- Captures Updates - new measures
- Collateral to advertise addition of HVAC

Trade Allies

- Ongoing Outreach
- Webinar – October 9
- Process
 - Trade Ally Application submitted
 - TRC reviews for eligibility and required documents
 - Insurances
 - W9
 - TRC holds a program orientation with Trade Ally



Marketing Update – Project Status

- **Launch Emails**
 - Sent
 - *Stats on next slide*
- **Campaign Emails (3 per program)**
 - Designs Pending Approval
- **Home Energy Assessment Half Pager**
 - Design Draft Pending
- **Home Energy Assessment Door Hanger**
 - Design Pending Approval



Marketing Update – Email Reporting

Campaign	Sends	Opens	Open Rate	Mobile Open Rate	Desktop Open Rate	Clicks	Click Rate
Home Launch	53,061	17,762	36.60%	59.60%	40.40%	733	1.50%
Business Launch	5,235	1,891	43.80%	14.90%	85.10%	199	4.60%

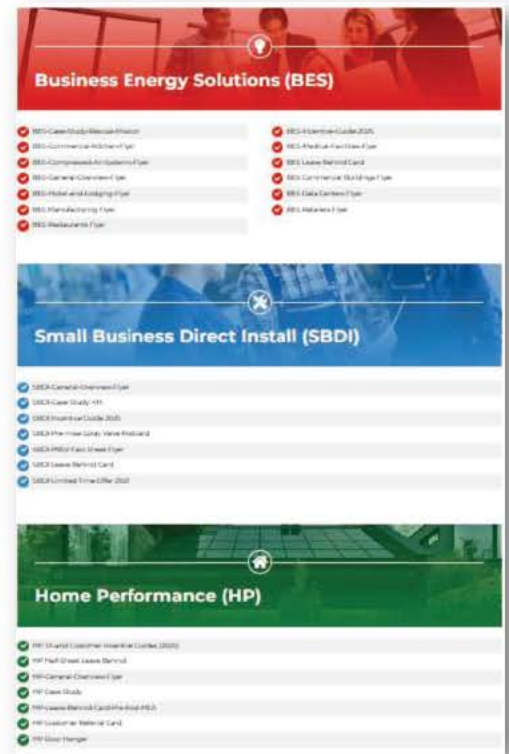
Home Email Subject Line: New Rebates for Home Energy Efficient Upgrades Are Here

Business Email Subject Line: Cash Incentives for Energy Efficient Upgrades Are Here

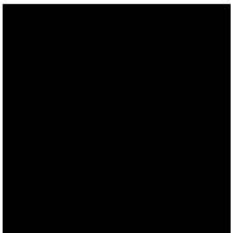


Marketing Update – Upcoming Projects

- **Adding HVAC to materials**
- **2026 Calendar**
- **TA Collateral Website**
- **Folder Design**
- **Event Needs (tablecloth, banners, swag)**



Program Contact Information



Issac Finn
Outreach

Phone: 859-417-2802

Email: ifinn@trccompanies.com

Program Phone: 844-657-1230

Program Email:
EnergyAdvantageKentucky@TRCcompanies.com

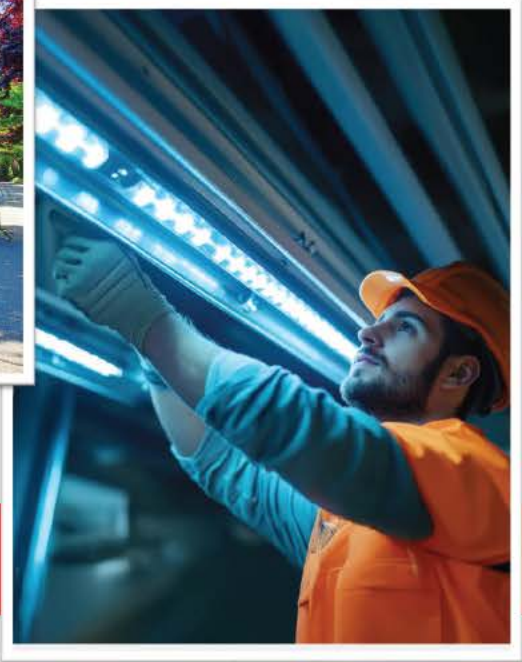




Thank You!



SAVING ENERGY STARTS HERE



ENERGY ADVANTAGE

EnergyAdvantage Update— December 15, 2025



SAVING ENERGY STARTS HERE

Agenda

- Safety Moment
- Program Update
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Operations
- Marketing
- Wrap Up



Safety Moment

December Mental Health

- **Recognize Holiday Stressors:**
 - Overwhelmed is normal during the Holidays, remember to take deep breaths.
- **Set Boundaries:**
 - Learn to say "no" to extra commitments, schedule personal time.
- **Prioritize Self-Care:**
 - Ensure you're getting enough sleep, eating well, and staying active.



2026 Events

Upcoming Events

- Gift Card Promotion (Homes)- TBD
- Key Account Manager (Lunch & Presentation)- TBD
- Researching local Home Shows and Events





ENERGY ADVANTAGE AT HOME

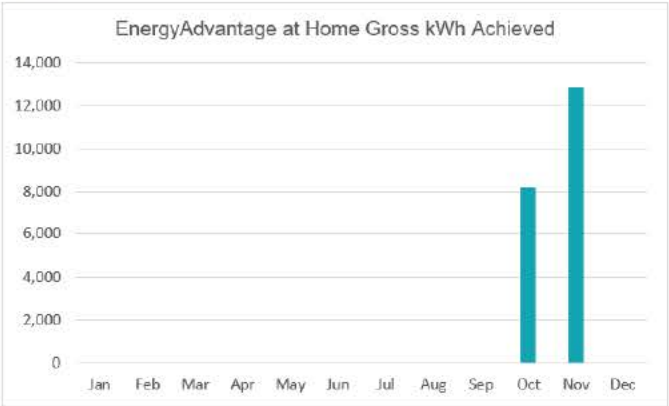


SAVING ENERGY STARTS HERE

Completed EnergyAdvantage At Home Program

EnergyAdvantage At Home

11%



Projects Completed
14

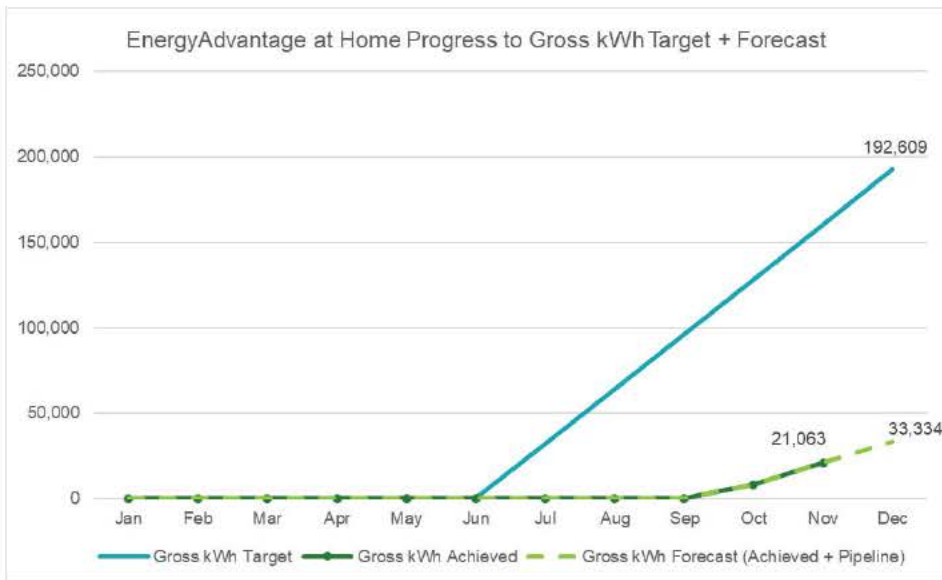
Avg. Gross kWh
1,504

Avg. Incentives
\$740

Avg. \$/Gross kWh
\$0.49

	Gross kWh	Target	%	Incentives	Budget	%
Achieved	21,063	192,609	11%	\$10,364	\$ 68,513	15%
2025 Pipeline	12,272	192,609	6%	\$4,500	\$ 68,513	7%
2025 Total	33,334	192,609	17%	\$ 14,864	\$ 68,513	22%

EnergyAdvantage At Home Program



- Outreach to high energy usage customers
- Continue to blanket the area with program collateral
- Actively attempting to schedule customers who have submitted a request for assessment



Applications

88 Home Energy Assessment Requests
20 Completed- including the 6 being invoiced today
4 Scheduled
64 scheduling, multiple attempts, will continue to do outreach

Residential Outreach

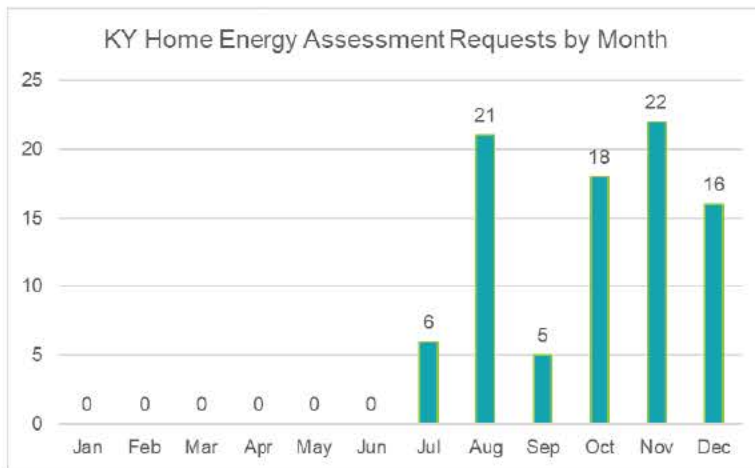
High Usage Customers

- 4- Call would not go through
- 5- Left Message followed up with no call back
- 6- Hung up
- 2- Mailbox full
- 2- Will check out website
- 1-Not Interested

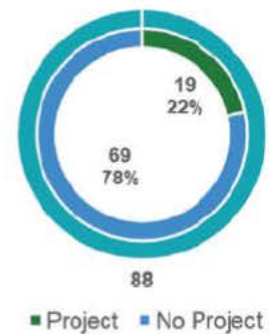
High Bill Customers

- 5- customers not interested but will look at the website
- 1- number was not a working number
- 3- left VM
- 2- did not have VM to leave a message
- 1- will speak to her husband
- 1- Customer Service Rep (CSR) completed application
 - Customer PM, will email full name

EnergyAdvantage At Home Program



KY Home Energy Assessment Requests With and Without Project Applications

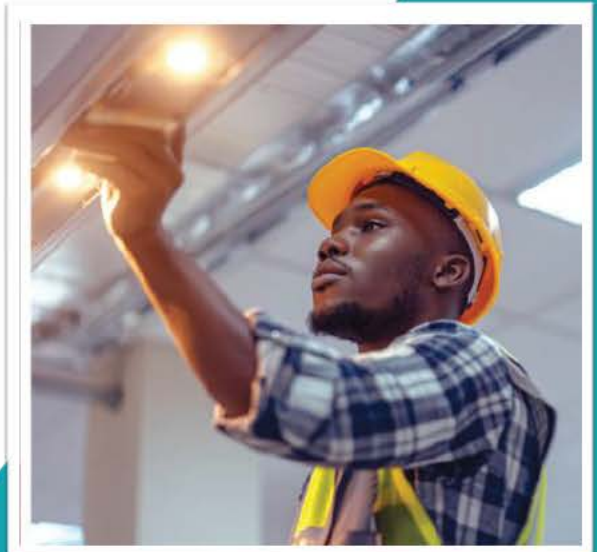


EnergyAdvantage at Home Invoiced

		EnergyAdvantage at Home Direct Install and Rebate Invoiced 2025							
		Direct Install			Rebate			Grand Total	
	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives
Jan	0	0	\$0	0	0	\$0	0	0	\$0
Feb	0	0	\$0	0	0	\$0	0	0	\$0
Mar	0	0	\$0	0	0	\$0	0	0	\$0
Apr	0	0	\$0	0	0	\$0	0	0	\$0
May	0	0	\$0	0	0	\$0	0	0	\$0
Jun	0	0	\$0	0	0	\$0	0	0	\$0
Jul	0	0	\$0	0	0	\$0	0	0	\$0
Aug	0	0	\$0	0	0	\$0	0	0	\$0
Sep	0	0	\$0	0	0	\$0	0	0	\$0
Oct	6	8,224	\$4,414	0	0	\$0	6	8,224	\$4,414
Nov	7	10,349	\$5,050	1	2,490	\$900	8	12,839	\$5,950
Dec	6	12,272	\$4,500	0	0	\$0	6	12,272	\$4,500
Total	19	30,845	\$13,964	1	2,490	\$900	20	33,335	\$14,864

Rebates

- 17 Rebate Applications
 - 1 completed
 - 6 in review (HVAC)
 - 10 new applications in progress
 - Reached out to customers to check in and answer questions



EnergyAdvantage for Home

November 2025

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December 2025

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

- 11/21-[REDACTED]
- 11/21-[REDACTED]
- 11/21-[REDACTED]
- 11/21-[REDACTED]
- 12/10-[REDACTED]
- 12/10-[REDACTED]
- 12/10-[REDACTED]
- 12/10-[REDACTED]
- 12/11-[REDACTED]



ENERGY ADVANTAGE FOR BUSINESS

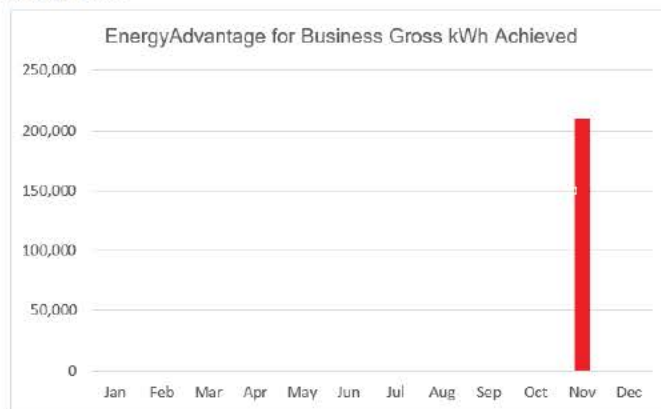


SAVING ENERGY STARTS HERE

EnergyAdvantage For Business Program

EnergyAdvantage for Business

17%



Projects
Completed
4

Avg. Gross
kWh
52,583

Avg. Incentives
\$3,092

Avg. \$/Gross
kWh
\$0.06

	Gross kWh	Target	%	Incentives	Budget	%
Achieved	210,334	1,269,774	17%	\$12,366	\$ 130,444	9%
2025 Pipeline	31,161	1,269,774	2%	\$3,474	\$ 130,444	3%
2025 Total	241,494	1,269,774	19%	\$ 15,840	\$ 130,444	12%



Engagement Strategy

Constant follow-up after initial discovery call, contact was unresponsive for a while but after a few calls/emails they decided to pursue the project.



Customer's Problem

A lot of their lights are non-LED but budget restraints cause them to upgrade slowly.



Program Solution

The incentives provided by Kentucky Power gives the customer some money back to pursue more lighting projects, they are currently working on another building and plan to do more.



Benefits

The incentives allow KCU to upgrade lighting more aggressively, with many buildings needing LED we will see continued KWH saved at this location.



Results

- Incentive: \$3,150
- Gross kWh Savings: 23,502
- Program cost per kWh: \$0.13

EnergyAdvantage For Business Program

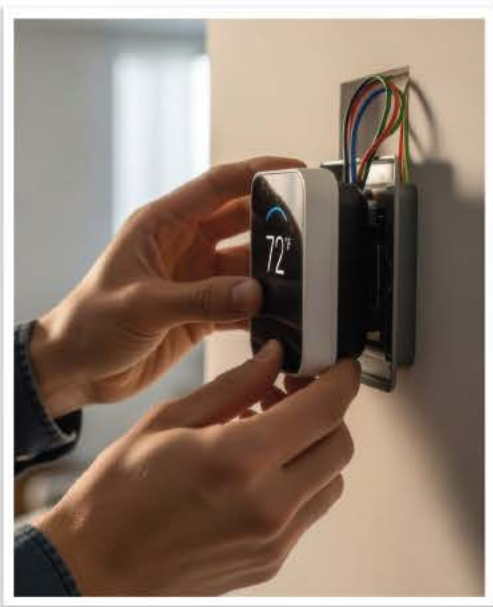


EnergyAdvantage For Business Program- Leads

Project Opportunities (Leads)



HVAC - Coming January 2026!



- Commercial AC Units
 - Split or packaged units
- Heat Pumps
 - Air-source and ground-source
 - Packaged terminal units (PTHPs)
- Heat Pump Water Heaters
- Smart Thermostats

In Progress

- Captures Updates - new measures
- Collateral to advertise addition of HVAC

Marketing Update – Project Status

- **Campaign Emails Sent**
 - 2 of 3 complete (final send on 12/17)
 - *Stats on next slide*
- **Campaign Social Posts**
 - All file sizes complete and sent out
- **Event Needs**
 - Pull up banner (design pending approval)
 - Tablecloth (pending order)
 - Swag (pending order)
- **Home Energy Assessment Half Pager**
 - Added line for electric heat / printing
- **Home Energy Assessment Door Hanger**
 - Added line for electric heat / printing



Marketing Update – Email Reporting

Time Sent	Campaign Name	Sends	Opens	Open Rate	Mobile Open Rate	Desktop Open Rate	Clicks	Click Rate
11/20/2025 9:27	Business Email 1	5218	1687	38.40%	20.80%	79.20%	53	1.20%
12/2/2025 12:04	Business Email 2	5204	1726	39.40%	22.30%	77.70%	51	1.20%
11/20/2025 9:30	Home Email 1	52937	18279	37.90%	55.20%	44.80%	363	0.80%
12/2/2025 12:12	Home Email 2	52824	17092	35.50%	49.70%	50.30%	207	0.40%

Business Email 1 Subject Line: Cut Energy Costs & Upgrade Comfort With EnergyAdvantage for Business

Business Email 2 Subject Line: Save Money. Feel Comfortable. Help the Environment.

Home Email 1 Subject Line: Big Savings Start Here – Introducing EnergyAdvantage

Home Email 2 Subject Line: Save Money. Feel Comfortable. Help the Environment.



Marketing Update – Upcoming Projects

- Printing Updated Materials with HVAC added
- TA Collateral Website
- Folder Design
- Magnets for TA/Contractor Trucks
- 2026 Campaign Designs



Program Contact Information



Issac Finn

Outreach

Phone: 859-417-2802

Email: ifinn@trccompanies.com

Program Phone: 844-657-1230

Program Email:
EnergyAdvantageKentucky@TRCcompanies.com





Thank You!



SAVING ENERGY STARTS HERE



ENERGY ADVANTAGE

EnergyAdvantage Update— January 19, 2026



SAVING ENERGY STARTS HERE

Agenda

- Safety Moment
- Program Update
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Operations
- Marketing
- Wrap Up



Safety Moment

January is National Radon Month



Test. Fix. Save a life. Learn more at epa.gov/radon.



Radon Is-

- A Health Risk
- An Invisible Threat
- Easy to Address

What You Can Do-

- Test Your Home: Use a simple DIY test kit or hire a professional

2026 Events

Upcoming Events

- **Key Account Manager (Lunch & Presentation)- February 4**
 - Tuscan Prime Italian Chophouse -Ashland, KY 41101
- **WSAZ Home & Garden Show- Huntington, WV- March 14-16**





ENERGY ADVANTAGE AT HOME

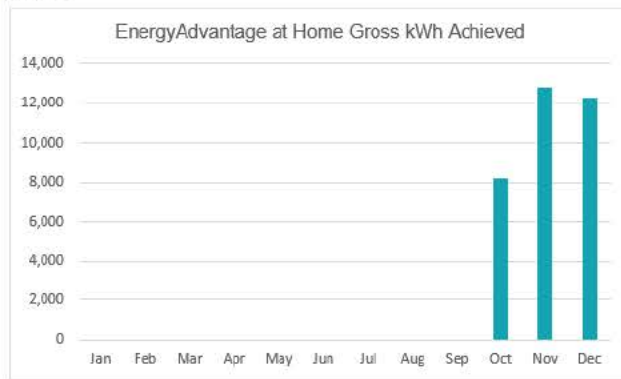


SAVING ENERGY STARTS HERE

Completed EnergyAdvantage At Home -2025

EnergyAdvantage At Home

17%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	33,334	192,609	17%	\$14,864	\$ 68,513	22%
2025 Pipeline	0	192,609	0%	\$500	\$ 68,513	1%
2025 Total	33,334	192,609	17%	\$ 15,364	\$ 68,513	22%

Projects Completed
20

Avg. Gross kWh
1,667

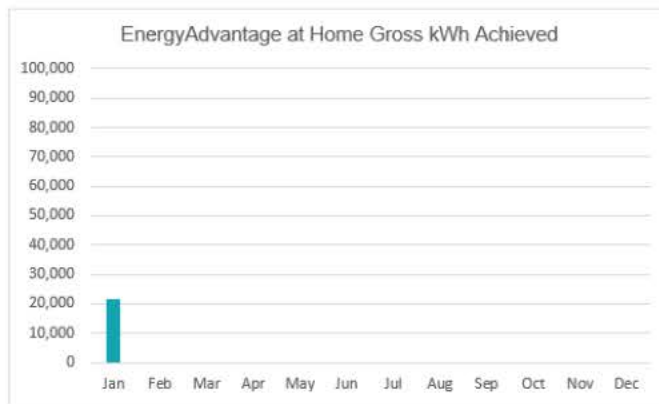
Avg. Incentives
\$743

Avg. \$/Gross kWh
\$0.45

EnergyAdvantage At Home -2026

EnergyAdvantage At Home

4%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	21,524	539,305	4%	\$7,370	\$ 217,383	3%
2026 Pipeline	5,188	539,305	1%	\$500	\$ 217,383	0%
2026 Total	26,712	539,305	5%	\$ 7,870	\$ 217,383	4%

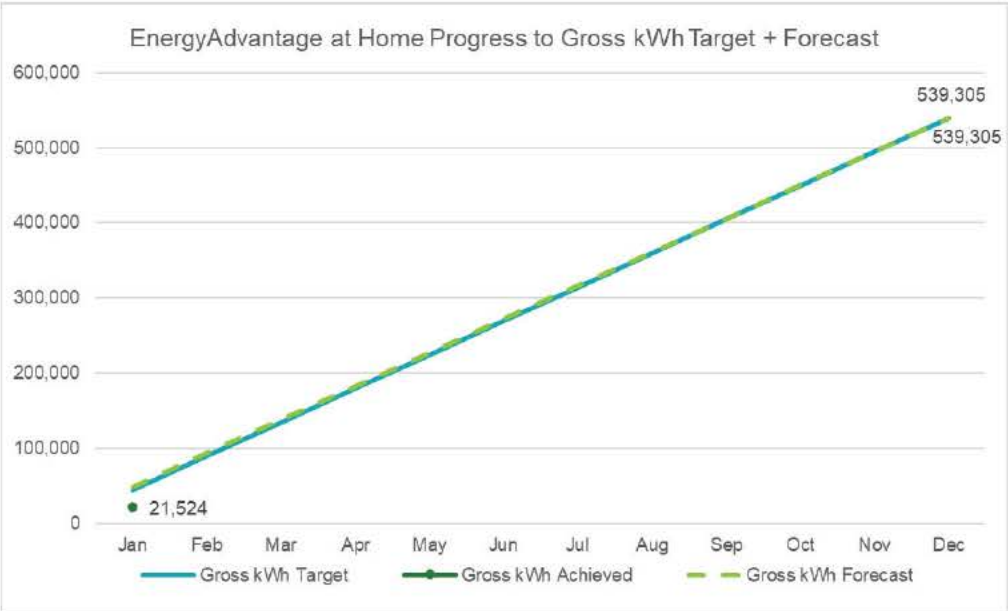
Projects Completed
12

Avg. Gross kWh
1,794

Avg. Incentives
\$614

Avg. \$/Gross kWh
\$0.34

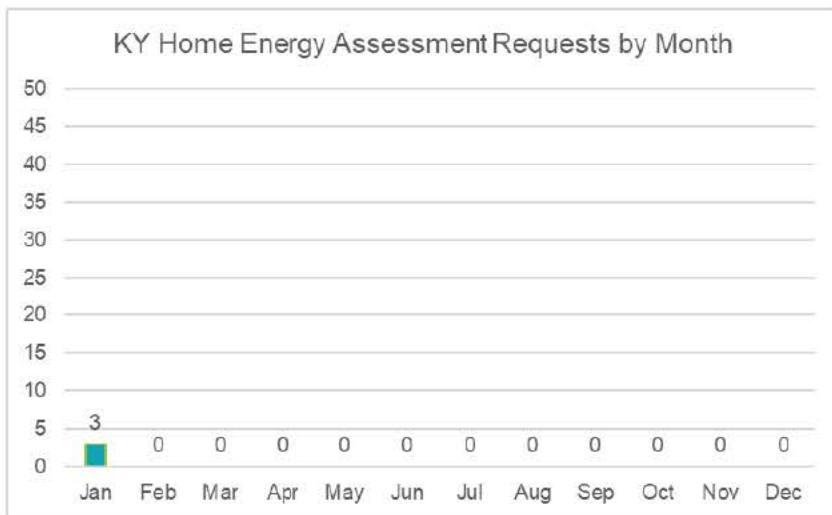
EnergyAdvantage At Home - 2026



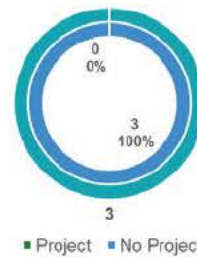
January 15 &16
 5 homes completed- approx. 8,500 kWh
 Onboarded local new crew member

	2026- HEIP	
	kWh	Incentives
Annual	539,305	\$ 217,383.00
Monthly	44,942.08	\$ 18,115.25
Per Home (2025 Average)	1667	\$ 743.00
Per Month to meet Goal	26.96	24.38122476
	27 homes per month	

EnergyAdvantage At Home - 2026



KY Home Energy Assessment Requests With and Without Project Applications



- 108 Home Energy Assessment Requests
 - 20 completed/invoiced in 2025
 - 7 completed/invoiced in 2026
 - 5 completed/not invoiced in 2026
 - 70 contacted, pending scheduling
 - 6 to be rescheduled

EnergyAdvantage At Home - 2026

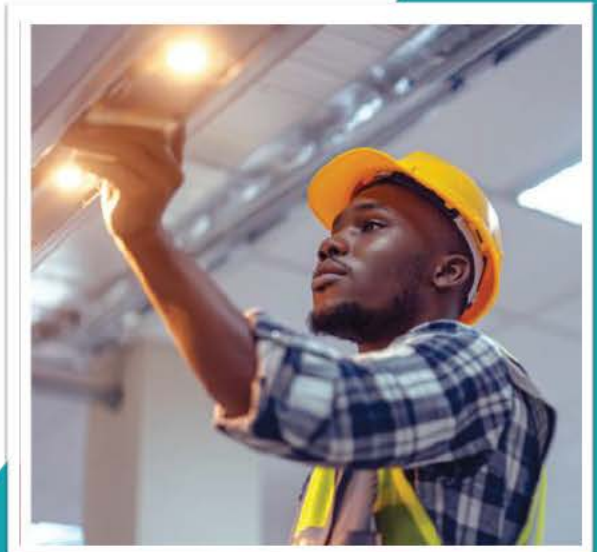
EnergyAdvantage at Home Direct Install and Rebate Invoiced 2026

	Direct Install			Rebate			Grand Total		
	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives
Jan	7	12,439	\$4,370	5	9,085	\$3,000	12	21,524	\$7,370
Feb	0	0	\$0	0	0	\$0	0	0	\$0
Mar	0	0	\$0	0	0	\$0	0	0	\$0
Apr	0	0	\$0	0	0	\$0	0	0	\$0
May	0	0	\$0	0	0	\$0	0	0	\$0
Jun	0	0	\$0	0	0	\$0	0	0	\$0
Jul	0	0	\$0	0	0	\$0	0	0	\$0
Aug	0	0	\$0	0	0	\$0	0	0	\$0
Sep	0	0	\$0	0	0	\$0	0	0	\$0
Oct	0	0	\$0	0	0	\$0	0	0	\$0
Nov	0	0	\$0	0	0	\$0	0	0	\$0
Dec	0	0	\$0	0	0	\$0	0	0	\$0
Total	7	12,439	\$4,370	5	9,085	\$3,000	12	21,524	\$7,370
2026 Goal								539,305	\$217,383
% Achieved								4%	3%

Rebates

36 Rebate Applications

- 7 in review
- 23 in progress
- 6 completed
 - 1 invoiced in 2025
 - 5 invoiced in 2026



EnergyAdvantage for Home- Site Visits

December 2025						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

January 2026						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

- 12/30- [REDACTED]
- 12/30- [REDACTED]
- 12/30- [REDACTED]
- 12/30- [REDACTED]
- 12/30- [REDACTED]
- 12/30- [REDACTED]
- 12/30- [REDACTED]
- 1/14- [REDACTED]
- 1/15- [REDACTED]
- 1/15- [REDACTED]
- 1/16- [REDACTED]
- 1/16- [REDACTED]
- 1/16- [REDACTED]



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ENERGY ADVANTAGE FOR BUSINESS



SAVING ENERGY STARTS HERE

EnergyAdvantage For Business- 2025

EnergyAdvantage for Business

19%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	241,286	1,269,774	19%	\$15,888	\$ 130,444	12%
2025 Pipeline	0	1,269,774	0%	\$0	\$ 130,444	0%
2025 Total	241,286	1,269,774	19%	\$ 15,888	\$ 130,444	12%

Projects
Completed
7

Avg. Gross
kWh
34,469

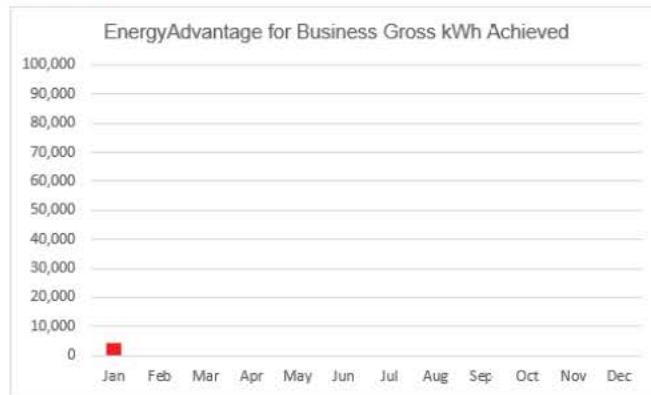
Avg. Incentives
\$2,270

Avg. \$/Gross
kWh
\$0.07

EnergyAdvantage For Business - 2026

EnergyAdvantage for Business

0%



Projects
Completed
1

Avg. Gross
kWh
4,152

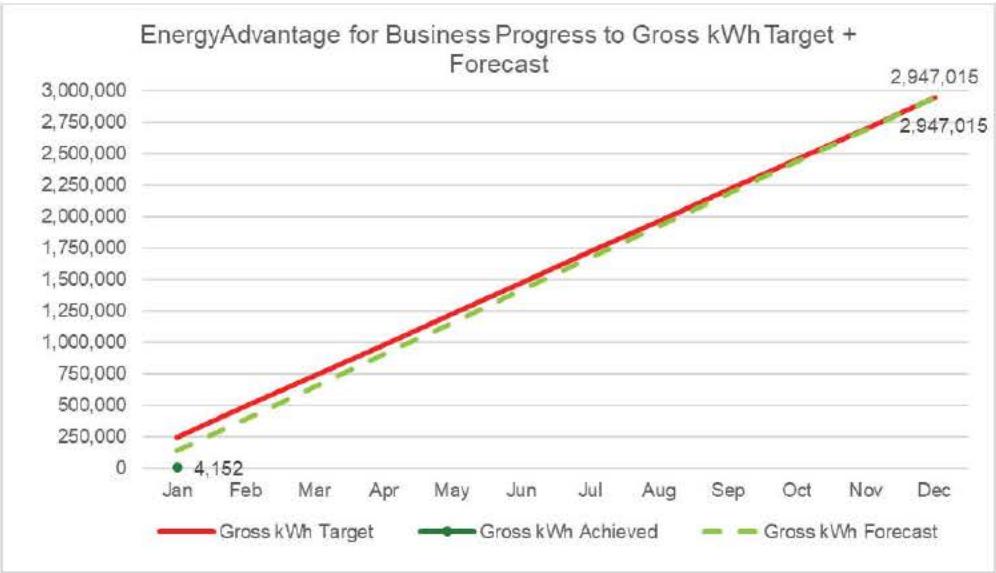
Avg. Incentives
\$414

Avg. \$/Gross
kWh
\$0.10

	Gross kWh	Target	%	Incentives	Budget	%
Achieved	4,152	2,947,015	0%	\$414	\$ 317,995	0%
2026 Pipeline	6,030	2,947,015	0%	\$260	\$ 317,995	0%
2026 Total	10,182	2,947,015	0%	\$ 674	\$ 317,995	0%

EnergyAdvantage For Business - 2026

EnergyAdvantage for Business Progress to Gross kWh Target + Forecast



	2026- Commercial kWh	Incentives
Annual	2,947,015	\$ 317,995.00
Monthly	245,584.58	\$ 26,499.58
Per Project (2025 Average)	35000	\$ 2,275.00
Per Month to meet Goal	7.02	11.6481685
	7 projects month	
	project size will vary	

EnergyAdvantage For Business Program- Customer Meetings

Green in person
Black by phone

S	M	T	W	T	F	S
			3		5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

• 12/15-		• 12/23-		• 1/12-	
• 12/15-		• 12/29-		• 1/14-	
• 12/15-		• 12/29-		• 1/14-	
• 12/15-		• 12/30-		• 1/14-	
• 12/15-		• 12/30-		• 1/14-	
• 12/15-		• 12/31-		• 1/14-	
• 12/15-		• 12/31-		• 1/14-	
• 12/15-		• 1/5-		• 1/15-	
• 12/15-		• 1/6-		• 1/15-	
• 12/15-		• 1/7-		• 1/16-	
• 12/15-		• 1/7-		• 1/16-	
• 12/16-		• 1/7-		• 1/16-	
• 12/16-		• 1/7-		• 1/16-	
• 12/16-		• 1/7-		• 1/16-	
• 12/16-		• 1/8-		• 1/16-	
• 12/18-		• 1/8-		• 1/16-	
• 12/18-		• 1/8-		• 1/16-	
• 12/18-		• 1/8-		• 1/16-	
• 12/18-		• 1/8-		• 1/16-	
• 12/23-		• 1/9-		• 1/16-	
• 12/23-		• 1/12-		• 1/12-	
• 12/23-		• 1/12- 1/12-			
• 12/23-					



An AEP Company

Globe Hardwood



Engagement Strategy

In-person cold visit turned into inspection and speaking about lighting projects, repeated visits and lunch helped secure information needed to submit project.



Customer's Problem

Customer needing additional funding for projects.



Program Solution

Lowering energy consumption and providing incentives for lights replaced helps customer see incentive returns to pursue other projects.



Benefits

Customer works with a lot of local residential and business accounts. A good experience with the process will encourage them to mention it to their customers who are looking at qualified projects.



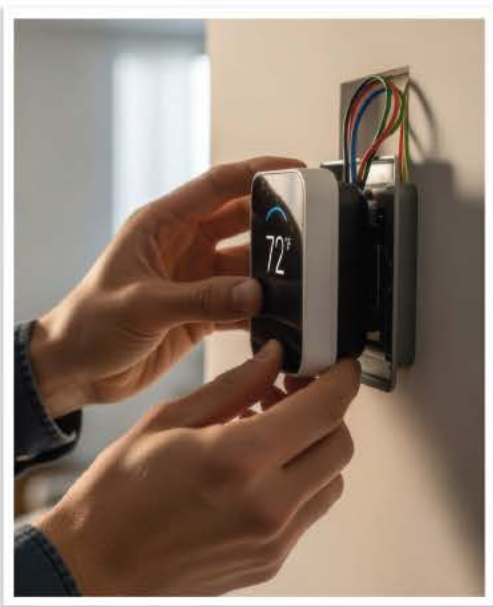
Results

- Incentive: \$260
- Gross kWh Savings: 6,030.45
- Program cost per kWh: \$0.04

EnergyAdvantage For Business Program- Leads

SITE NAME	PROJECT TYPE	ANTICIPATED SUBMIT DATE
	LIGHTING	2/10
	LIGHTING	2/15
	LIGHTING	2/20
	LIGHTING	3/1
	LIGHTING	3/1
	LIGHTING	3/1
	LIGHTING	4/1
	LIGHTING	5/1
	LIGHTING	5/1

HVAC - Added January 2026!



- Commercial AC Units
 - Split or packaged units
- Heat Pumps
 - Air-source and ground-source
 - Packaged terminal units (PTHPs)
- Heat Pump Water Heaters
- Smart Thermostats

Marketing Update – Project Status

- **2026 Plan**
 - Calendar created
- **Campaign Emails Sent for Approval**
 - 3 for each program
- **Events:**
 - Pull up banner printed
 - Tablecloth printed
 - Swag (pending order)
- **Collateral:**
 - Half sheet (printed)
 - Door Hanger (printed)
 - Program Folders (2 pending approval)
 - Incentive guides updates (pending approval)
 - Truck Magnets (2 pending approval)



Marketing Update – 2026 Calendar

Kentucky Power - EnergyAdvantage for Home												
Tactic	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Contractor Outreach												
Recruitment	X	X	X	X	X	X	X	X	X	X	X	X
Virtual Webinar		X							X			
Email Newsletter			X			X			X			X
Award Event											X	
Customer Outreach												
Email	X	X	X	X	X	X	X	X	X	X	X	X
Social Posts	X	X	X	X	X	X	X	X	X	X	X	X
Direct Mail		X			X					X		
Webinar				X								

Kentucky Power - EnergyAdvantage for Business												
Tactic	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Trade Ally Outreach												
Recruitment	X	X	X	X	X	X	X	X	X	X	X	X
Virtual Webinar		X							X			
Email Newsletter			X			X			X			X
Award Event											X	
Customer Outreach												
Email	X	X	X	X	X	X	X	X	X	X	X	X
Social Posts	X	X	X	X	X	X	X	X	X	X	X	X
Webinar								X				
Chamber of Comm. "Kit"		X			X					X		



Program Contact Information



Issac Finn
Outreach

Phone: 859-417-2802

Email: ifinn@trccompanies.com

Program Phone: 844-657-1230

Program Email:
EnergyAdvantageKentucky@TRCcompanies.com





Thank You!



SAVING ENERGY STARTS HERE



ENERGY ADVANTAGE

February 11, 2026



SAVING ENERGY STARTS HERE

Agenda

- Safety Moment
- Meet the Team
- Who is TRC
- Program Design
- Marketing
- Program Overviews
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Operations
- Discussion / Collaboration



Safety Moment

Strategies to prevent heart disease

- Get moving: Aim for at least 30 to 60 minutes of activity daily
- Eat a heart-healthy diet
- Maintain a healthy weight
- Get quality sleep
- Manage stress
- Get regular health screening tests



TRC – Program Implementation Team



Deborah Hill
Program Director

Fran Phillips
*Operations
Manager*

Peter Hynson
*Engineering
Manager*

Issac Finn
Outreach

Erica Tieman
Sr. Marketing Manager



Mark Louris
Residential QA QC

Courtney Capshaw
Marketing Director

Patricia Reed
Operations

Donna Flippin
Data Analyst

Jennifer Voss
*Marketing
Coordinator*

Laura Sagan
JumpStart

Who is TRC?

TRC partners with utilities to design and manage energy efficiency programs. We provide full-service support across the program lifecycle:

- Program Design & Management
- Application Intake & Project Qualification
- Incentive Calculation & Fulfillment
- Engineering Reviews
- Customer Support Services
- Contractor & Partner Management
- Outreach & Marketing Support



TRC National Reach



Program Design



Program Design

Inputs:

- Stakeholder priorities
- Data (historical participation, market analysis)
- Utility data - customer count, usage, class
- Technical reference manuals (IL TRM)
- Final rulings, goals, and budgets

Outputs:

- What-if scenarios
- Cost-effectiveness testing (CSPM)
- Demand-focused incentive structure
- Iterative stakeholder feedback process



Program Design

Home Energy Improvement: Goals

	2025	2026	2027	2028	Total
Gross Energy Savings (kWh)	192,609	539,305	693,393	192,609	1,617,916

Commercial Energy Solutions: Goals

	2025	2026	2027	2028	Total
Gross Energy Savings (kWh)	1,269,774	2,947,015	3,367,814	1,269,775	8,854,378

Engineering Support

Engineering's role in the program:

- Adding new measures to online application
- Verifying calculations comply with TRM
- QAQC of projects (technical review, inspections)
- Working with EM&V to verify savings

TRC engineering support available for customers:

- Application technical assistance
 - Equipment/measure eligibility
 - Online application questions
- Energy savings calculations
- Incentive estimates
- Simple Payback Period & Return on Investment (ROI) calculations

Project Summary



Project Cost without Incentive	\$	20,000.00
Estimated Incentive	\$	5,000.00
Annual Energy Savings (kWh)		50,000.00
Measure Effective Useful Life (yrs)		10
Electricity Cost (\$/kWh)	\$	0.12
Project Cost with Incentive	\$	15,000.00
Annual Cost Savings	\$	6,000.00
Simple Payback (yrs)		2.5
Simple Return on Investment (ROI)		300%
Annualized Return on Investment (ROI)		29%

Impact Summary

Savings
50,000 kWh



is equivalent to...



9.4
gas vehicles removed
from the road



49.2
homes powered
for one month



15.6
tons of landfill CO₂
emissions eliminated

Marketing



Marketing – Collateral / Materials

• Program Collateral

- Incentive guides
- One pagers
- Home program half-pager
- Home program door hanger
- TA Truck Magnets
- Folders

• Outreach Materials

- PowerPoint Template
- Name badges
- Business Cards
- Pull-Up Banners
- Tablecloth



Marketing – 2026 Calendar

Kentucky Power - EnergyAdvantage for Home												
Tactic	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Contractor Outreach												
Recruitment	X	X	X	X	X	X	X	X	X	X	X	X
Virtual Webinar				X					X			
Email Newsletter			X			X			X			X
Award Event											X	
Customer Outreach												
Email	X	X	X	X	X	X	X	X	X	X	X	X
Social Posts	X	X	X	X	X	X	X	X	X	X	X	X
Direct Mail		X			X					X		
Webinar				X								

Kentucky Power - EnergyAdvantage for Business												
Tactic	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Trade Ally Outreach												
Recruitment	X	X	X	X	X	X	X	X	X	X	X	X
Virtual Webinar				X					X			
Email Newsletter			X			X			X			X
Award Event											X	
Customer Outreach												
Email	X	X	X	X	X	X	X	X	X	X	X	X
Social Posts	X	X	X	X	X	X	X	X	X	X	X	X
Webinar								X				
Chamber of Comm. "Kit"		X			X					X		



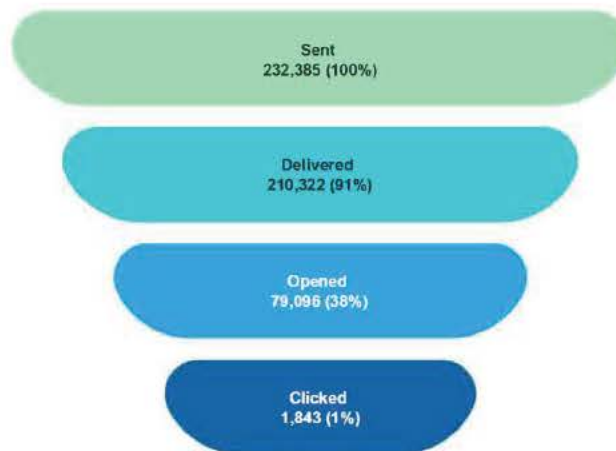
Marketing - Campaigns

- **Launch Materials – first notifications of the programs**
 - Emails
 - Social graphics
 - Postcard designs
- **Campaign Materials – ongoing notifications**
 - Emails
 - Social graphics
 - Postcard designs



Marketing – Email Performance

Time Sent	Campaign Name	Sends	Opens	Open Rate	Clicks	Click Rate	Subject Lines
11/20/2025 9:27	Business Email 1	5218	1687	38.40%	53	1.20%	Cut Energy Costs & Upgrade Comfort With EnergyAdvantage for Business
12/2/2025 12:04	Business Email 2	5204	1726	39.40%	51	1.20%	Save Money. Feel Comfortable. Help the Environment.
12/17/2025 8:38	Business Email 3	5190	1671	38.30%	24	0.50%	Prepare your business for the season
11/20/2025 9:30	Home Email 1	52937	18279	37.90%	363	0.80%	Big Savings Start Here – Introducing EnergyAdvantage
12/2/2025 12:12	Home Email 2	52824	17092	35.50%	207	0.40%	Save Money. Feel Comfortable. Help the Environment.
12/17/2025 8:36	Home Email 3	52716	17314	36.10%	148	0.30%	EnergyAdvantage: Is Your Home Ready?





ENERGY ADVANTAGE AT HOME



SAVING ENERGY STARTS HERE

EnergyAdvantage at Home: Overview

- **Program Details** – Available to residential customers within Kentucky Power's service territory with electrically heated homes.
- **Home Energy Assessment** – Identifies how much energy a home uses, where it's inefficient, and what improvements can save energy and increase comfort.
- **Direct Install (DI) Upgrades** – No-cost energy-saving products installed during the assessment to deliver immediate savings and encourage further weatherization projects and rebate participation.
- **Rebates** – Cash incentives for deeper energy efficiency upgrades, such as HVAC improvements and weatherization measures.

*Customers can take part in the Home Energy Assessment with DI upgrades, rebates, or both.
An assessment is required to receive DI upgrades but not to apply for rebates.*

EnergyAdvantage at Home: HEA & DI Measures



- TRC subcontractor, Earth Right, will perform all Home Energy Assessments and install all DI measures.
- DI measures capped at \$600 per electric account.



Direct Install Measures		
Measure		Incentive Cap
Whole Home Assessment		\$150 per Home
Low-flow Showerhead		\$20 per measure
Low-flow Bathroom Faucet Aerator		\$10 per measure
Low-flow Kitchen Faucet Aerator		\$10 per measure
Domestic Hot Water Pipe Insulation		\$4 per measure
Water Heater Temperature Setback		\$15 per measure
Water Heater Wrap		\$75 per measure
Advanced Power Strip – Tier 1		\$30 per measure
Air Sealing with Blower Door – Whole Home Pathway Available to homes 15+ years old		\$320 per home (\$250 blower door, \$70 air sealing)
Residential Duct Sealing & Insulation		\$150 per Home
Air Sealing – Prescriptive Pathway	Caulking, Sealing, Tape	\$20 per measure
	Outlet and Switch Gaskets	\$5 per measure
	Door Sweep	\$50 per measure
	Window/Door Weatherstripping	\$40 per measure

EnergyAdvantage at Home: Rebates

- Additional rebates are capped at \$1,500 per electric account.
- Rebates may not exceed total project cost.

Weatherization Incentives	
Measure	Incentive Cap
Residential Attic Insulation	\$230 per Home
Residential Floor Insulation Above Crawlspace	\$220 per Home

HVAC and Water Heating Incentives			
Measure			Incentive Cap
Central Air Conditioner	Tier 1	Split System	\$200 each
		Single Package	
	Tier 2	Split System	\$250 each
		Single Package	
Air Source Heat Pump or Ducted Mini-Split	Tier 1	Split System	\$400 each
		Single Package	
	Tier 2	Split System	\$500 each
		Single Package	
Ductless Air Conditioner System	Single-Zone		\$100 per System
	Multi-Zone		\$200 per System
Ductless Heat Pump System	Single-Zone		\$200 per System
	Multi-Zone		\$400 per System
Room Air Conditioner			\$20 each
Heat Pump Water Heater			\$500 each
Smart Thermostat			\$50 each

EnergyAdvantage At Home

Completed and Paid -

Home Energy Assessments – 30
Rebates – 10

Home Energy Assessment Requests -

Home Energy Assessments Scheduled – 20
Attempting to Schedule – 74

Rebates Applications -

In Review – 3 (Documentation Needed)
In Progress– 19 (Outreach to Customer)

Outreach Targets -

- High Energy Users
- Community Gathering Locations
 - Grocery/Retail
 - Churches
 - Senior Center
 - Daycares
- Event/Table Opportunities
- Contractors – HVAC and Insulation

	2026- HEIP	
	kWh	Incentives
Annual	539,305	\$ 217,383.00
Monthly	44,942.08	\$ 18,115.25
Per Home (2025 Average)	1667	\$ 743.00
Per Month to meet Goal	26.96	24.38122476
	27 homes per month	

EnergyAdvantage At Home

Efficiency Measure	2026			2025			Grand Total		
	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives
60 Gallon Domestic Hot Water Heater Tank Wrap				3	819	\$220	3	819	\$220
80 Gallon Domestic Hot Water Heater Tank Wrap				1	348	\$75	1	348	\$75
Advanced Power Strip - Tier 1	30	2,400	\$780	92	7,360	\$2,520	122	9,760	\$3,300
Air Sealing with Blower Door - AC and Electric Resistance Heat	2	999	\$640	2	1,890	\$640	4	2,889	\$1,280
Air Sealing with Blower Door - Heat Pump	8	9,105	\$2,560	15	6,423	\$4,740	23	15,528	\$7,300
Air Sealing with Blower Door - No AC and Electric Resistance Heat				1	244	\$320	1	244	\$320
Air Source Heat Pump - Tier 1 - Split System	6	5,835	\$2,400	2	940	\$800	8	6,776	\$3,200
Air Source Heat Pump - Tier 2 - Single Package	1	1,846	\$500				1	1,846	\$500
Air Source Heat Pump - Tier 2 - Split System							5	13,375	\$500
Caulking, Sealing, or Polyethylene Tape (Between Conditioned and Unconditioned Space)	120	386	\$90				120	386	\$90
Central Air Conditioner - Tier 1 - Split System	1	242	\$200				1	242	\$200
Duct Sealing	11	6,648	\$1,650	17	13,491	\$2,550	28	20,139	\$4,200
Ductless Heat Pump - Multi Zone	1	1,618	\$400				1	1,618	\$400
Ductless Heat Pump - Single Zone	2	1,770	\$400				2	1,770	\$400
Heat Pump Water Heater	1	5,188	\$500				1	5,188	\$500
Outlet Gasket				5	19	\$25	5	19	\$25
R-3 Insulation of 1/2 thickness on 1/2" DHW Pipe				6	251	\$24	6	251	\$24
Smart Thermostat	1	799	\$50	2	1,549	\$100	3	2,349	\$150
Whole Home Assessment	11		\$1,650	19		\$2,850	30		\$4,500
Grand Total	195	36,836	\$11,820	165	33,334	\$14,864	365	83,546	\$27,184

Requesting a Home Energy Assessment

Request is submitted through the online portal.

Customer or contractor enters customer account number and account name to validate customer has a residential Kentucky Power account.

Note: The account name must be entered exactly as displayed on the customer's utility bill.

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Trade Ally Login | Chat with a Representative

My Online Applications | Start Assessment Application | Start Rebate Application

EnergyAdvantage at Home

Welcome to the AEP Kentucky Power EnergyAdvantage at Home Portal. Here you can request a Home Energy Assessment or a rebate and view the application progress. A new application will need to be submitted for a Home Energy Assessment or each rebate.

We take the privacy and security of your personal information seriously. Click [here](#) to review the Kentucky Power Notice at Collection relating to residents in the service territory.

Please enter the account number and site name from your Kentucky Power utility bill where the Home Energy Assessment is being performed and efficient measures installed. If you need assistance, please contact us at 844-657-1230 or EnergyAdvantage@kentucky@trccompanies.com.

Account Number (First 10-digits only, No Dashes or Spaces) *

Account Name *

Validate Account



ENERGY ADVANTAGE FOR BUSINESS



SAVING ENERGY STARTS HERE

EnergyAdvantage for Businesses: Overview

- **Program Details** – Available through **June 30, 2028**, for commercial customers in the Kentucky Power service area.
- **Incentives** – Lighting incentives available in 2025, HVAC incentives in 2026, and food service incentives in 2027.
- **Equipment Standards** – Installed equipment must meet recognized efficiency certifications (CEE, DLC, ENERGY STAR®, AHRI, or other Kentucky Power–approved standards).
- **Funding Limits** – Annual cap of **\$25,000 per electric account**; incentives cannot exceed total project cost. Projects over **\$10,000** require **pre-approval** before equipment purchase or installation.

Energy Advantage for Business: Measures

2025 Lighting Only

- LEDs
- Network Lighting Controls
- Daylight Controls
- Occ Sensors

2026 Lighting & HVAC

- Commercial AC
- Heat Pumps
- Heat Pump Water Heater
- Smart Thermostats

2027 Lighting, HVAC & Food Service

- Combination Ovens
- Fryers
- Steam Cookers
- Dishwashers

EnergyAdvantage for Business: Lighting Measures



Exterior Lighting Incentives

Measure		Incentive Cap
Fixture	LED ≤ 30W	\$30 per Fixture
	LED 31 - 100W	\$35 per Fixture
	LED 100 - 200W	\$50 per Fixture
	LED 201 - 300W	\$75 per Fixture

Interior Lighting Incentives

Measure		Incentive Cap
Low-Bay Fixture	LED ≤ 200W	\$10 per Fixture
	LED ≤ 200W	\$50 per Fixture
High-Bay Fixture	LED 201 - 250W	\$60 per Fixture
	LED 251 - 300W	\$75 per Fixture
Troffer	LED ≤ 80W	\$20 per Fixture
	LED 2ft ≤ 10W	\$1.50 per Lamp
Linear Lamp	LED 3ft ≤ 13W	\$3 per Lamp
	LED 4ft ≤ 22W	
	LED 8ft ≤ 43W	
	LED U-Bend ≤ 22W	
Downlight		LED Recessed, Surface, Pendant Downlight
Refrigerated Case Lighting		LED Refrigerated/Freezer Case Light
		\$3.50 per Foot

Interior Lighting Controls Incentives

Measure		Incentive Cap
Occupancy Sensor	Wall Switch	\$15 per Sensor
	Fixture-Mounted	\$15 per Sensor
	Remote or Wall-Mounted	\$30 per Sensor
	Integrated into LED Fixture	\$15 per Sensor
Daylight Sensor	Fixture-Mounted	\$10 per Sensor
	Remote or Wall-Mounted	\$20 per Sensor
Dual Occupancy & Daylight Sensor	Fixture-Mounted	\$30 per Sensor
	Integrated into LED Fixture	\$15 per Sensor
Networked Lighting Controls		\$0.20 per Watt Reduced

EnergyAdvantage for Business: HVAC Measures



HVAC & Water Heating Incentives		
Measure		Incentive Cap
Air-Cooled Split or Single Packaged HVAC System	< 65 kbtu (< 5.42 ton)	\$40 per Ton
	65 ≤ kBtu < 135 (5.42 ≤ tons < 11.25)	
	135 ≤ kBtu < 240 (11.25 ≤ tons < 20)	
	240 ≤ kBtu < 760 (20 ≤ tons < 63.3)	
	≥ 760 kbtu (≥ 63.3 ton)	
	Single Package < 65 kbtu (< 5.42 ton)	
	Split System < 65 kbtu (< 5.42 ton)	
Air Source Heat Pump		\$175 per Ton
Packaged Terminal Heat Pumps		\$250 per Ton
Packaged Terminal Air Conditioners		\$125 per Ton
Geothermal Heat Pump	Closed Loop Water-to-Air	\$500 per Ton
	Open Loop Water-to-Air	
	Closed Loop Water-to-Water	
	Open Loop Water-to-Water	
	DGX-to-Air DGX-to-Water	
Smart Thermostat		\$50 per Thermostat
Commercial Heat Pump Water Heater		\$500 Per Unit

EnergyAdvantage for Business: Food Service Measures

Food Service & Misc. Incentives		
Measure		Incentive Cap
Commercial Combination Oven	Pan Capacity ≤ 14	\$600 per Oven
	Pan Capacity 15 - 29	\$1,000 per Oven
	Pan Capacity ≥ 30	\$1,430 per Oven
Commercial Electric Fryer	Large and Standard Vat	\$500 per Fryer
Commercial Electric Steam Cooker	3-Pan Capacity	\$900 per Cooker
	4-Pan Capacity	\$1,000 per Cooker
	5-Pan Capacity	\$1,200 per Cooker
	≥ 6-Pan Capacity	\$1,380 per Cooker
Commercial Dishwasher		\$220 per Dishwasher

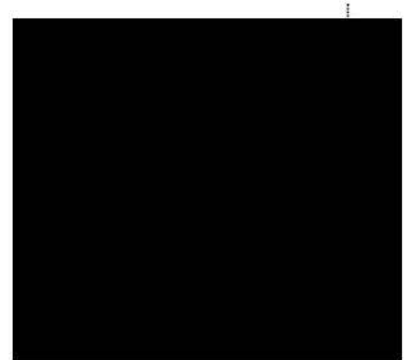
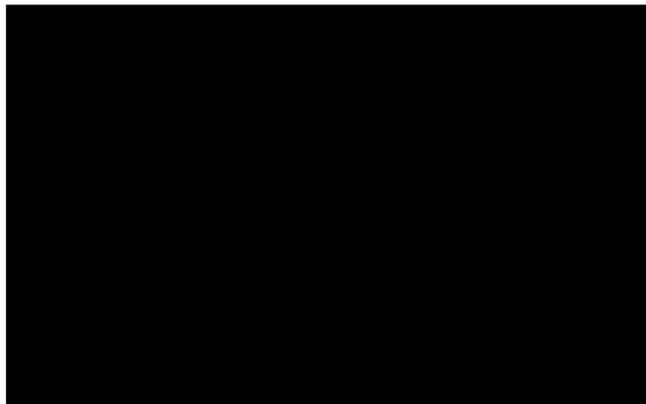
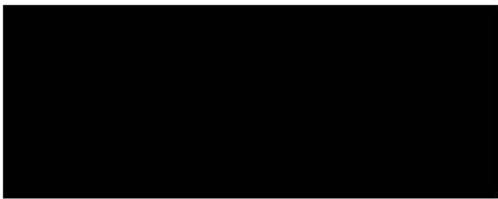


EnergyAdvantage For Business

Project Number	Site	Project Type	Savings kWh	Savings kW	Incentive Total
CES2025_008886	[REDACTED]	Lighting	7,450	2	\$372
CES2025_008942	[REDACTED]	Lighting	65,875	19	\$3,433
CES2025_008943	[REDACTED]	Lighting	14,904	4	\$714
CES2025_008944	[REDACTED]	Lighting	106,274	30	\$6,346
CES2025_008950	[REDACTED]	Lighting	23,280	6	\$1,873
CES2025_008973	[REDACTED]	Lighting	3,054	1	\$840
CES2025_009034	[REDACTED]	Lighting	20,448	0	\$2,310
CES2026_009165	[REDACTED]	Lighting	4,152	0	\$414
CES2026_009254	[REDACTED]	Lighting	6,030	2	\$260
CES2026_009270	[REDACTED]	Lighting	3,204	2	\$1,260
CES2026_009293	[REDACTED]	Lighting	5,184	1	\$240
TOTAL			259,856	67	\$18,062

	2026- Commercial kWh	Incentives
Annual	2,947,015	\$ 317,995.00
Monthly	245,584.58	\$ 26,499.58
Per Project (2025 Average)	35000	\$ 2,275.00
Per Month to meet Goal	7.02	11.6481685
	7 projects month	
	project size will vary	

Projects



EnergyAdvantage For Business Program- Leads

SITE NAME	County	PROJECT TYPE	ANTICIPATED SUBMIT DATE
	Carter	LIGHTING	2/10
	Carter	LIGHTING	2/15
	Boyd	LIGHTING	2/20
	Carter	LIGHTING	3/1
	Carter	LIGHTING	2/4
	Pike	LIGHTING	3/1
	Boyd	LIGHTING	4/1
	Boyd	LIGHTING	5/1
	Boyd	LIGHTING	5/1

Outreach

Targeting Research/Outreach Commercial

- Restaurants
- Grocery Stores
- Large kWh users
- Contractors- HVAC & Lighting
- Medical Facilities
- Economic Development
- Chambers of Commerce



Operations



EnergyAdvantage Trade Ally Network Benefits

- Expand customer base and boost sales
- Participation in Trade Ally Roundtable Meetings
- Early access to program updates and announcements
- Business listing featured on the Kentucky Power website.
- Submit projects on behalf of customers
- Track application progress through an online portal
- Recognition and rewards for outstanding achievements

Note: You do **not** need to be in the network to submit projects - customers may also install and submit projects themselves.



Stay Connected!

- **Visit:** KentuckyPower.com/EnergyAdvantageBusiness
- **Visit:** KentuckyPower.com/EnergyAdvantageHome
- **Email:** EnergyAdvantageKentucky@trccompanies.com
- **Customer Service Call Center:** 844-657-1230
- **Outreach:** Issac Finn- ifinn@trccompanies.com- 859-417-2802
- **Engineering:** Peter Hynson- PHynson@trccompanies.com -540-666-8437
- **Operations:** Fran Phillips- Fphillips@trccompanies.com- 301-275-7427
- **Management:** Deborah Hill- Dhill@trccompanies.com- 252-459-6654

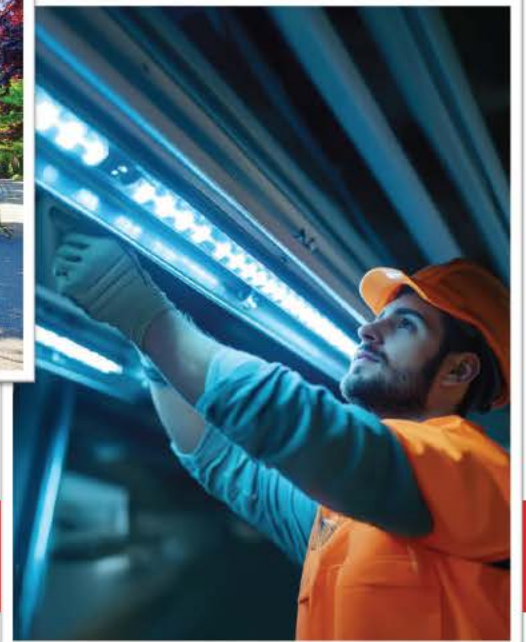




Thank You!



SAVING ENERGY STARTS HERE



ENERGY ADVANTAGE

EnergyAdvantage Update— March 16, 2026



SAVING ENERGY STARTS HERE

Agenda

- Safety Moment
- Program Update
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Operations
- Marketing
- Wrap Up



Safety Moment



Screen Time and Your Eye Health

- Dry eye symptoms and digital eye strain are more common with the use of computer and smart phone.
- Give your eyes a break with the 20-20-20 rule
- Every 20 minutes, Take 20 seconds, To look 20 feet away.

Invoicing

March 2026						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April 2026						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2026						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

2026 Events

Upcoming Events

- Hazard Community and Technical College - March 25
- Hillbilly Days Pikeville April- 16-18

Past Events

- WSAZ Home & Garden Show- Huntington, WV- March 14-16





ENERGY ADVANTAGE AT HOME

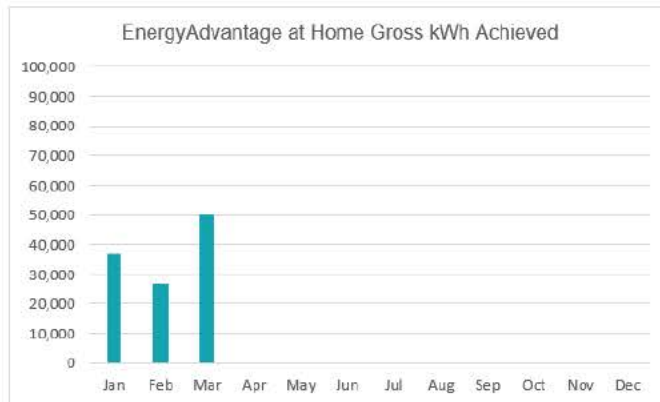


SAVING ENERGY STARTS HERE

EnergyAdvantage At Home - 2026

EnergyAdvantage At Home

21%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	113,605	539,305	21%	\$33,323	\$ 217,383	15%
2026 Pipeline	0	539,305	0%	\$0	\$ 217,383	0%
2026 Total	113,605	539,305	21%	\$ 33,323	\$ 217,383	15%

Projects Completed
54

Avg. Gross kWh
2,104

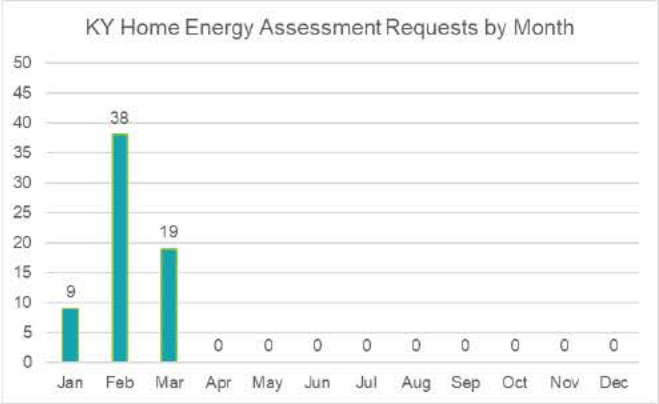
Avg. Incentives
\$617

Avg. \$/Gross kWh
\$0.29

EnergyAdvantage At Home - 2026



	2026- HEIP kWh	Incentives
Annual	539,305	\$ 217,383.00
Monthly	44,942.08	\$ 18,115.25
Per Home (2025 Average)	1667	\$ 743.00
Per Month to meet Goal	26.96	24.38122476
	27 homes per month	



EnergyAdvantage At Home - 2026

EnergyAdvantage at Home Direct Install and Rebate Invoiced 2026

	Direct Install			Rebate			Grand Total		
	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives
Jan	11	19,538	\$7,370	8	17,298	\$4,450	19	36,836	\$11,820
Feb	7	12,915	\$4,333	2	13,979	\$730	9	26,894	\$5,063
Mar	26	49,874	\$16,440	0	0	\$0	26	49,874	\$16,440
Apr	0	0	\$0	0	0	\$0	0	0	\$0
May	0	0	\$0	0	0	\$0	0	0	\$0
Jun	0	0	\$0	0	0	\$0	0	0	\$0
Jul	0	0	\$0	0	0	\$0	0	0	\$0
Aug	0	0	\$0	0	0	\$0	0	0	\$0
Sep	0	0	\$0	0	0	\$0	0	0	\$0
Oct	0	0	\$0	0	0	\$0	0	0	\$0
Nov	0	0	\$0	0	0	\$0	0	0	\$0
Dec	0	0	\$0	0	0	\$0	0	0	\$0
Total	44	82,327	\$28,143	10	31,277	\$5,180	54	113,605	\$33,323

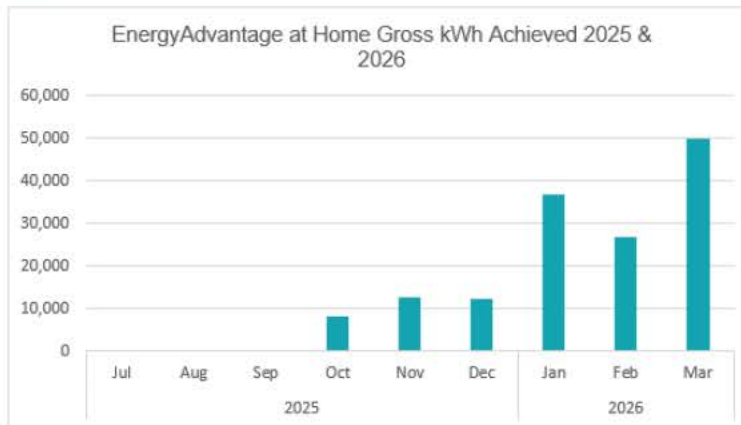
2026 Goal	539,305	\$217,383
% Achieved	21%	15%

EnergyAdvantage At Home - 2026

Eff Equip Description	Pipeline			2026			2025			Grand Total		
	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives
60 Gallon Domestic Hot Water Heater Tank Wrap				1	273	\$75	3	819	\$220	4	1,092	\$295
80 Gallon Domestic Hot Water Heater Tank Wrap							1	348	\$75	1	348	\$75
Advanced Power Strip - Tier 1				92	7,360	\$2,420	92	7,360	\$2,520	184	14,720	\$4,940
Air Sealing with Blower Door - AC and Electric Resistance Heat				7	9,903	\$2,240	2	1,890	\$640	9	11,793	\$2,880
Air Sealing with Blower Door - Heat Pump				31	29,392	\$9,920	15	6,423	\$4,740	46	35,815	\$14,660
Air Sealing with Blower Door - No AC and Electric Resistance Heat				1	814	\$320	1	244	\$320	2	1,058	\$640
Air Source Heat Pump - Tier 1 - Split System				6	5,835	\$2,400	2	940	\$800	8	6,776	\$3,200
Air Source Heat Pump - Tier 2 - Single Package				1	1,846	\$500				1	1,846	\$500
Air Source Heat Pump - Tier 2 - Split System				5	13,375	\$500				5	13,375	\$500
Attic Insulation - Heat Pump				1	604	\$230				1	604	\$230
Caulking, Sealing, or Polyethylene Tape (Between Conditioned and Unconditioned Space)				129	415	\$97				129	415	\$97
Central Air Conditioner - Tier 1 - Split System				1	242	\$200				1	242	\$200
Door Sweep				8	468	\$200				8	468	\$200
Door Weatherstripping				52	196	\$156				52	196	\$156
Duct Sealing				41	33,430	\$6,015	17	13,491	\$2,550	58	46,921	\$8,565
Ductless Heat Pump - Multi Zone				1	1,618	\$400				1	1,618	\$400
Ductless Heat Pump - Single Zone				2	1,770	\$400				2	1,770	\$400
Heat Pump Water Heater				1	5,188	\$500				1	5,188	\$500
Outlet Gasket				10	38	\$50	5	19	\$25	15	56	\$75
R-3 Insulation of 1/2 thickness on 1/2" DHW Pipe							6	251	\$24	6	251	\$24
Smart Thermostat				1	799	\$50	2	1,549	\$100	3	2,349	\$150
Switch Gasket				10	38	\$50				10	38	\$50
Whole Home Assessment				44		\$6,600	19		\$2,850	63	0	\$9,450
Grand Total	0	0	\$0	445	113,605	\$33,323	165	33,334	\$14,864	610	146,939	\$48,187

Completed EnergyAdvantage At Home- 2025-2026 Total

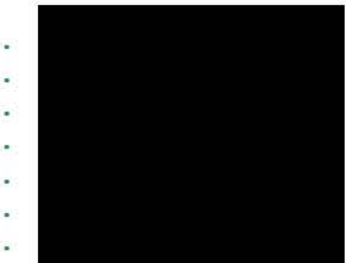
EnergyAdvantage At Home



	Projects	Gross kWh	Incentives
2025 Achieved	20	33,334	\$14,864
2026 Achieved	54	113,605	\$33,323
2026 Pipeline	0	0	\$0
2025 & 2026 Total	74	146,939	\$ 48,187

EnergyAdvantage for Home- Site Visits

February 2026						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28



March 2026						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

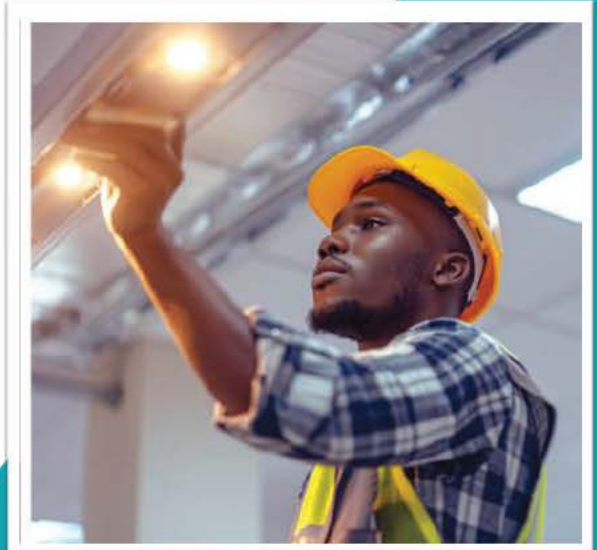
Rebates

43 Rebate Applications

- 1 in review
- 11 completed
- 31 on hold (documentation/ details pending)

Individual Rebates represented in 11 completed projects

- Air Source Heat Pump – 7
- Attic Insulation – 1
- Central Air Conditioner – 1
- Ductless Heat Pump – 3
- Heat Pump Water Heater – 1
- Smart Thermostat – 3





ENERGY ADVANTAGE FOR BUSINESS

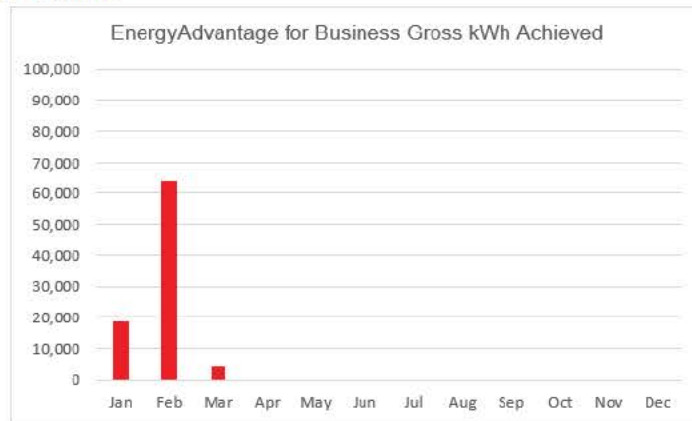


SAVING ENERGY STARTS HERE

EnergyAdvantage For Business

EnergyAdvantage for Business

3%



Projects
Completed
9

Avg. Gross
kWh
9,604

Avg. Incentives
\$699

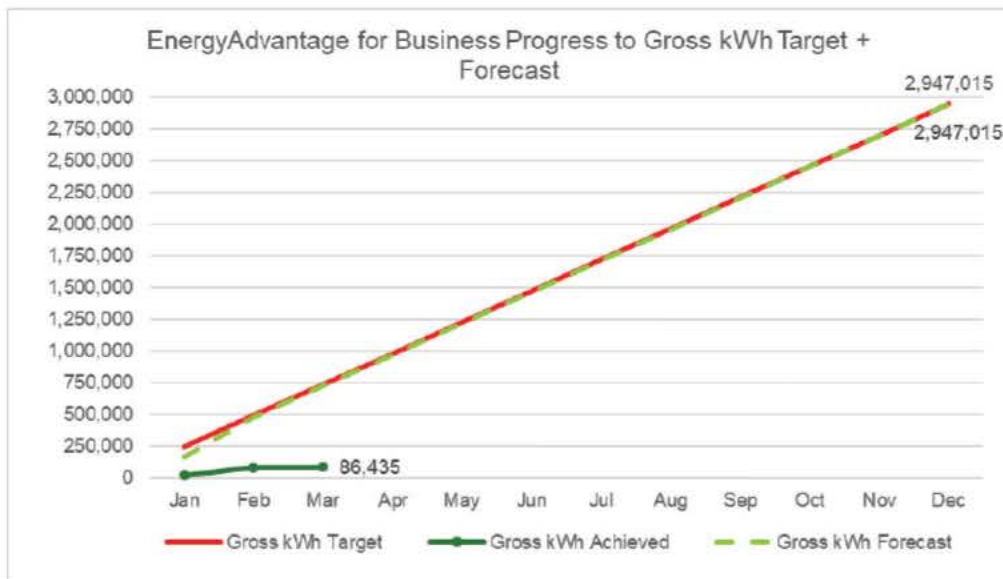
Avg. \$/Gross
kWh
\$0.07

	Gross kWh	Target	%	Incentives	Budget	%
Achieved	86,435	2,947,015	3%	\$6,294	\$ 317,995	2%
2026 Pipeline	22,194	2,947,015	1%	\$1,188	\$ 317,995	0%
2026 Total	108,629	2,947,015	4%	\$ 7,482	\$ 317,995	2%

Project Pipeline

Project Number	Site	Project Type	Project Status	Current Gross Savings kWh	Current Incentive Total	Estimated Installation Completion Date
CES2026_009561	[REDACTED]	Lighting	1-Initiation	22,194	\$1,188	4/1/2026

EnergyAdvantage For Business - 2026



	2026- Commercial kWh	Incentives
Annual	2,947,015	\$ 317,995.00
Monthly	245,584.58	\$ 26,499.58
Per Project (2025 Average)	35000	\$ 2,275.00
Per Month to meet Goal	7.02	11.6481685
	7 projects month project size will vary	

EnergyAdvantage For Business Program- Customer Meetings

Green in person
Black by phone

February 2026						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

March 2026						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

• 2/11-		• 2/13-		• 3/5-	
• 2/11-		• 2/13-		• 3/5-	
• 2/11-		• 2/13-		• 3/5-	
• 2/12-		• 2/13-		• 3/5-	
• 2/12-		• 2/26-		• 3/5-	
• 2/12-				• 3/5-	
• 2/12-		• 2/2		• 3/5-	
• 2/12-		• 2/27-		• 3/5-	
• 2/12-		• 3/3-		• 3/5-	
• 2/12-				• 3/5-	
• 2/12-		• 3/3-		• 3/5-	
• 2/12-		• 3/3-		• 3/6-	
• 2/12-		• 3/4-		• 3/6-	
• 2/12-		• 3/4-		• 3/6-	
• 2/12-		• 3/4-		• 3/6-	
• 2/12-		• 3/4-		• 3/6-	
• 2/12-		• 3/4-		• 3/6-	
• 2/12-		• 3/4-		• 3/6-	
• 2/12-		• 3/5-		• 3/6-	
• 2/13-		• 3/5-		• 3/6-	
• 2/13-		• 3/5-		• 3/6-	
• 2/13-		• 3/5-		• 3/6-	
• 2/13-				• 3/6-	



Engagement Strategy

During a visit to the area, on site visit to Little Ceasar's Pizza identified a potential lighting project. Connected with maintenance director contact for Kentucky and West Virginia locations. Worked with him to get the project submitted.



Customer's Problem

Lighting upgrades needed and funding to support.



Program Solution

LED incentives project submitted and continued discussion with corporate to pursue more projects at other locations in the service territory.



Benefits

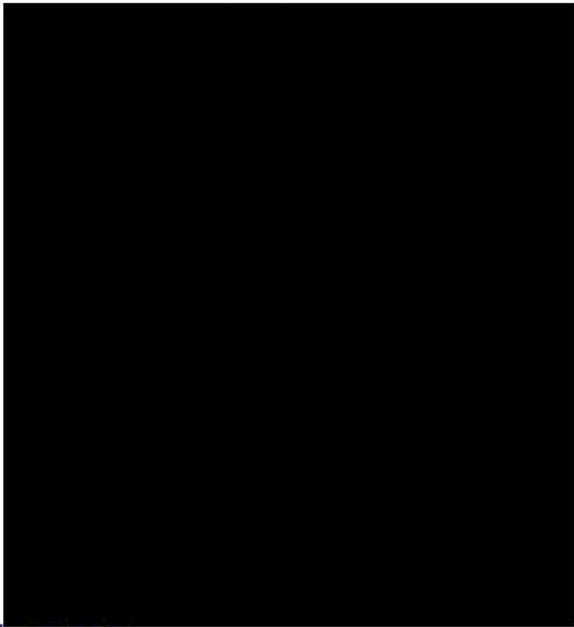
There are a ton of stores, and many of them have opportunities available. Continue to monitor and work with the corporate contact for additional projects.



Results

- Incentive: \$420
- Gross kWh Savings: 26,534
- Program cost per kWh: \$0.02

EnergyAdvantage For Business Program- Leads

SITE NAME	PROJECT TYPE	ANTICIPATED SUBMIT DATE
	LIGHTING	4/1
	LIGHTING	4/7
	LIGHTING	4/24
	LIGHTING	5/1
	LIGHTING	5/1
	LIGHTING	5/1
	LIGHTING	5/1
	LIGHTING	5/15
	LIGHTING	6/1
	LIGHTING	6/1
	LIGHTING	6/1
	LIGHTING	6/1

Marketing Update – Project Status

• Campaigns

- Email designed drafts sent for approval
- Content created for most of the year
- Working on social graphics

• Collateral:

- Program Folders (approved)
- Incentive guides updates (approved and printed)
- Truck Magnets (approved and printed)

• Website

- Home page mock-up drafted
- Working on combined program webpage mock-up
- Working on approved TA list to add to website



New Trade Allies



Air Power Energy- Rebate Processor



American Heating & Cooling
 HVAC Residential and Commercial

BriteSwitch

BriteSwitch Rebate
 Processor



ROI Energy- Rebate
 Processor



Appalachian Refrigeration, Heating & Cooling-
 Lighting, Fixtures, and Controls Lighting - Interior
 HVAC (Residential) HVAC (C&I) Insulation
 (Residential)



Wesco- Lighting, Fixtures, and Controls



EAG-LED- Lighting, Fixtures, and Controls



Diggs Lighting- Rebate
 Processor

Incentive Rebate360[®]

Incentive Rebate360
 Rebate Processor



MW Co. LLC- Lighting, Fixtures, and
 Controls



Utility Metering Solutions, LLC- Lighting, Fixtures,
 and Controls



Call Center

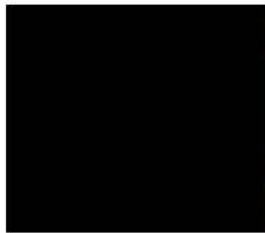
January 100% answer rate

February 89% answer rate with 3 calls returned



- Continuing to make outbound calls to residential high energy users, 469 outbound calls to date

Program Contact Information



Issac Finn
Outreach

Phone: 859-417-2802

Email: ifinn@trccompanies.com

Program Phone: 844-657-1230

Program Email:
EnergyAdvantageKentucky@TRCcompanies.com





Thank You!



SAVING ENERGY STARTS HERE



ENERGY ADVANTAGE

EnergyAdvantage Update – April 20, 2026



SAVING ENERGY STARTS HERE

Agenda

- Safety Moment
- Discussion Items
- Program Update
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Marketing
- Operations
- Wrap Up



Safety Moment

APRIL IS STRESS AWARENESS MONTH

Get more
sleep

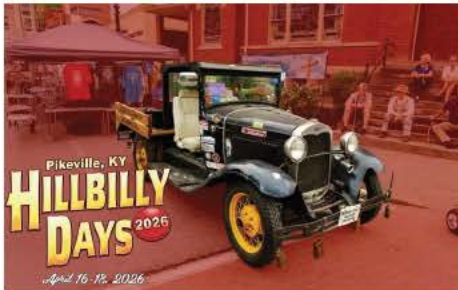
Exercise
or
Meditate

Lean on
your
Support
Network

Listen to
Music

Go
outside

2026 Events



Past Events

- Hill Billy Days April 16-17
- Hazard Community and Technical College - March 25



Discussion Topics



DISCUSSION: EnergyAdvantage at Home Self Install Measures

Approved

- Smart Thermostat
- Room AC

Program guidelines remain consistent for the rebate:

1. Home must have electric heat to qualify. (Smart Thermostat)
2. Rebate request and supporting documentation must be presented within 60 days of purchase. (Smart Thermostat and Room AC)
3. Purchased equipment must be ENERGY STAR® (Smart Thermostat and Room AC)
4. The rebate amount will not exceed to purchase price of the new equipment (Smart Thermostat and Room AC)



DISCUSSION: Smart Thermostats

Input Needed

EnergyAdvantage for Business

- Recommend opening the smart measure up to non-ENERGY STAR® thermostats that meet the description of "advanced thermostats" from the IL TRM.
 - This would align with the TRM method that we are referencing to calculate savings for the measure.
- Changes Required: Remove "EnergyStar®" from incentive guide. Add a footnote defining the new requirements below:



Eligible thermostats are limited to the control of HVAC unitary equipment and must exceed the performance of conventional programmable thermostats through automated control capabilities. The device must automatically maintain temperature schedules and setpoints based on device inputs or environmental data beyond basic time and temperature data, provide two-way communication, and allow centralized or remote supervisory control (e.g., EMS, cloud platform, or BAS). The device must not rely solely on manual user programming.

- Also recommend allowing Guest Room Energy Management Systems (GREMS) under the smart thermostats measure. These are thermostats with automatic temperature setbacks based on guest occupancy detection
- These are covered by a separate measure in the IL TRM, so it is not an exact match. However, energy savings claimed using the smart thermostat methodology would be conservative compared to the GREMS measure

DISCUSSION: Kitchen Equipment

Input Needed

Timeline to start marketing the new Food Service measures for 2027

Food Service & Misc. Incentives		
Measure		Incentive Cap
Commercial Combination Oven	Pan Capacity ≤ 14	\$600 per Oven
	Pan Capacity 15 - 29	\$1,000 per Oven
	Pan Capacity ≥ 30	\$1,430 per Oven
Commercial Electric Fryer	Large and Standard Vat	\$500 per Fryer
Commercial Electric Steam Cooker	3-Pan Capacity	\$900 per Cooker
	4-Pan Capacity	\$1,000 per Cooker
	5-Pan Capacity	\$1,200 per Cooker
	≥ 6-Pan Capacity	\$1,380 per Cooker
Commercial Dishwasher		\$220 per Dishwasher



PROGRAM Updates





ENERGY ADVANTAGE AT HOME

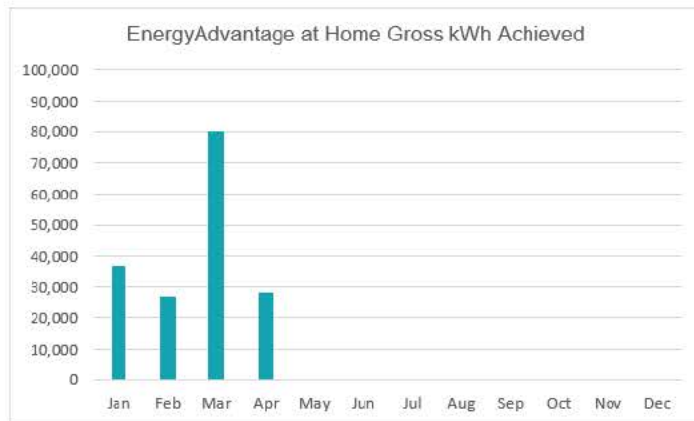


SAVING ENERGY STARTS HERE

EnergyAdvantage At Home

EnergyAdvantage At Home

32%



Projects
Completed
89

Avg. Gross
kWh
1,929

Avg. Incentives
\$629

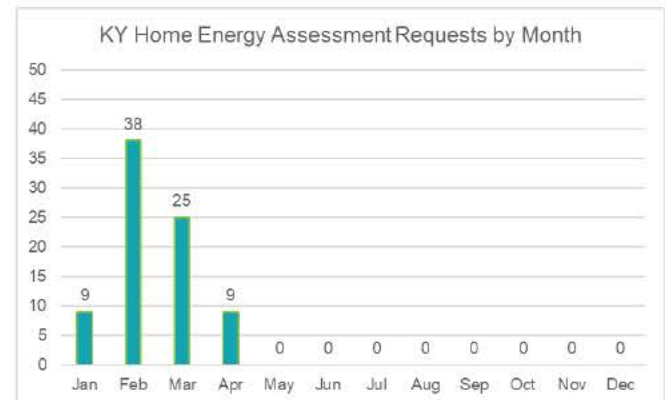
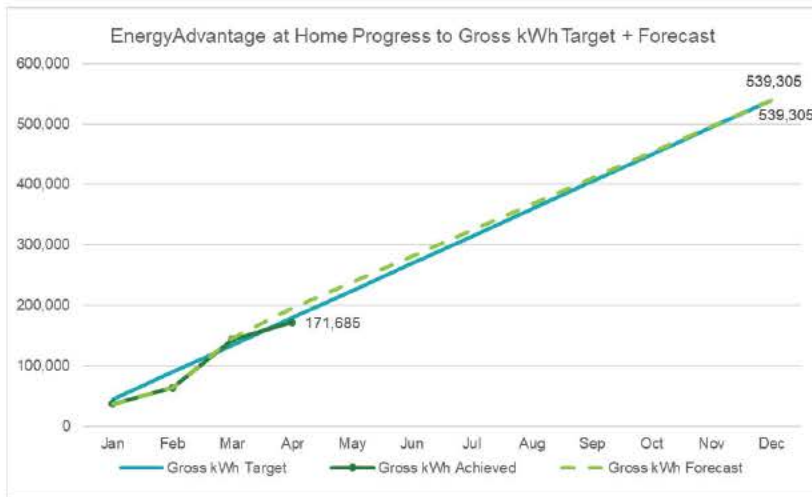
Avg. \$/Gross
kWh
\$0.33

	Gross kWh	Target	%	Incentives	Budget	%
Achieved	171,685	539,305	32%	\$55,985	\$ 217,383	26%
2026 Pipeline	1,792	539,305	0%	\$470	\$ 217,383	0%
2026 Total	173,477	539,305	32%	\$ 56,455	\$ 217,383	26%



Member of WSP

EnergyAdvantage At Home



EnergyAdvantage At Home

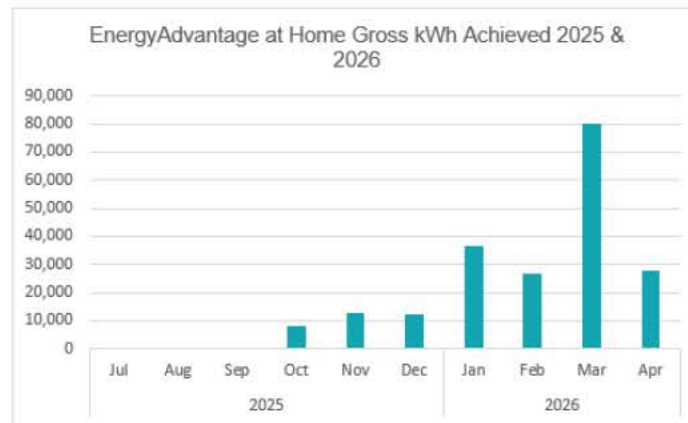
EnergyAdvantage at Home Direct Install and Rebate Invoiced 2026

	Direct Install			Rebate			Grand Total		
	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives
Jan	11	19,538	\$7,370	8	17,298	\$4,450	19	36,836	\$11,820
Feb	7	12,915	\$4,333	2	13,979	\$730	9	26,894	\$5,063
Mar	44	80,052	\$28,580	0	0	\$0	44	80,052	\$28,580
Apr	17	27,903	\$10,523	0	0	\$0	17	27,903	\$10,523
May	0	0	\$0	0	0	\$0	0	0	\$0
Jun	0	0	\$0	0	0	\$0	0	0	\$0
Jul	0	0	\$0	0	0	\$0	0	0	\$0
Aug	0	0	\$0	0	0	\$0	0	0	\$0
Sep	0	0	\$0	0	0	\$0	0	0	\$0
Oct	0	0	\$0	0	0	\$0	0	0	\$0
Nov	0	0	\$0	0	0	\$0	0	0	\$0
Dec	0	0	\$0	0	0	\$0	0	0	\$0
Total	79	140,408	\$50,805	10	31,277	\$5,180	89	171,685	\$55,985

2026 Goal	539,305	\$217,383
% Achieved	32%	26%

Completed EnergyAdvantage At Home- 2025-2026 Total

EnergyAdvantage At Home



	Projects	Gross kWh	Incentives
2025 Achieved	20	33,334	\$14,864
2026 Achieved	89	171,685	\$55,985
2026 Pipeline	1	1,792	\$470
2025 & 2026 Total	110	206,811	\$ 71,319

Energy Advantage At Home

Eff Equip Description	Pipeline			2026			2025			Grand Total		
	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives
60 Gallon Domestic Hot Water Heater Tank Wrap				5	1,365	\$375	3	819	\$220	8	2,184	\$595
80 Gallon Domestic Hot Water Heater Tank Wrap							1	348	\$75	1	348	\$75
Advanced Power Strip - Tier 1				150	12,000	\$4,010	92	7,360	\$2,520	242	19,360	\$6,530
Air Sealing with Blower Door - AC and Electric Resistance Heat				11	13,277	\$3,520	2	1,890	\$640	13	15,167	\$4,160
Air Sealing with Blower Door - Heat Pump	1	955	\$320	60	55,001	\$19,200	15	6,423	\$4,740	76	62,378	\$24,260
Air Sealing with Blower Door - No AC and Electric Resistance Heat				1	814	\$320	1	244	\$320	2	1,058	\$640
Air Source Heat Pump - Tier 1 - Split System				6	5,835	\$2,400	2	940	\$600	8	6,776	\$3,200
Air Source Heat Pump - Tier 2 - Single Package				1	1,846	\$500				1	1,846	\$500
Air Source Heat Pump - Tier 2 - Split System				5	13,375	\$500				5	13,375	\$500
Attic Insulation - Heat Pump				1	604	\$230				1	604	\$230
Caulking, Sealing, or Polyethylene Tape (Between Conditioned and Unconditioned Space)				279	898	\$209				279	898	\$209
Central Air Conditioner - Tier 1 - Split System				1	242	\$200				1	242	\$200
Door Sweep				24	1,405	\$600				24	1,405	\$600
Door Weatherstripping				52	196	\$156				52	196	\$156
Duct Sealing	1	837	\$150	68	55,075	\$10,065	17	13,491	\$2,550	86	69,403	\$12,765
Ductless Heat Pump - Multi Zone				1	1,618	\$400				1	1,618	\$400
Ductless Heat Pump - Single Zone				2	1,770	\$400				2	1,770	\$400
Heat Pump Water Heater				1	5,188	\$500				1	5,188	\$500
Outlet Gasket				50	188	\$250	5	19	\$25	55	207	\$275
R-3 Insulation of 1/2 thickness on 1/2" DHW Pipe							6	251	\$24	6	251	\$24
Smart Thermostat				1	799	\$50	2	1,549	\$100	3	2,349	\$150
Switch Gasket				50	188	\$250				50	188	\$250
Whole Home Assessment				79		\$11,850	19		\$2,650	98	0	\$14,700
Grand Total	2	1,792	\$470	848	171,685	\$55,985	165	33,334	\$14,864	1,015	206,811	\$71,319

EnergyAdvantage for Home- Outreach

March 2026						
S	M	T	W	T	F	S
1	2	3	4	5		7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Trade Allies

- 3/30-[REDACTED]
- 3/30-[REDACTED]
- 3/30-[REDACTED]
- 3/30-[REDACTED]
- 3/30-[REDACTED]

April 2026						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		



An **AEP** Company

ENERGY ADVANTAGE FOR BUSINESS



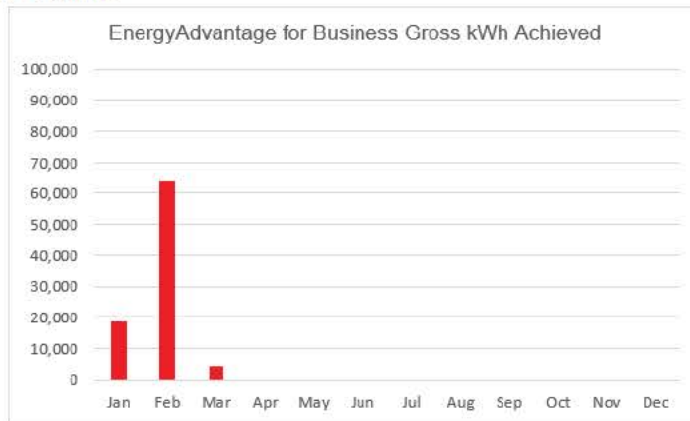
TRC
Member of **WSP**

SAVING ENERGY STARTS HERE

EnergyAdvantage For Business

EnergyAdvantage for Business

3%



Projects
Completed
9

Avg. Gross
kWh
9,604

Avg. Incentives
\$699

Avg. \$/Gross
kWh
\$0.07

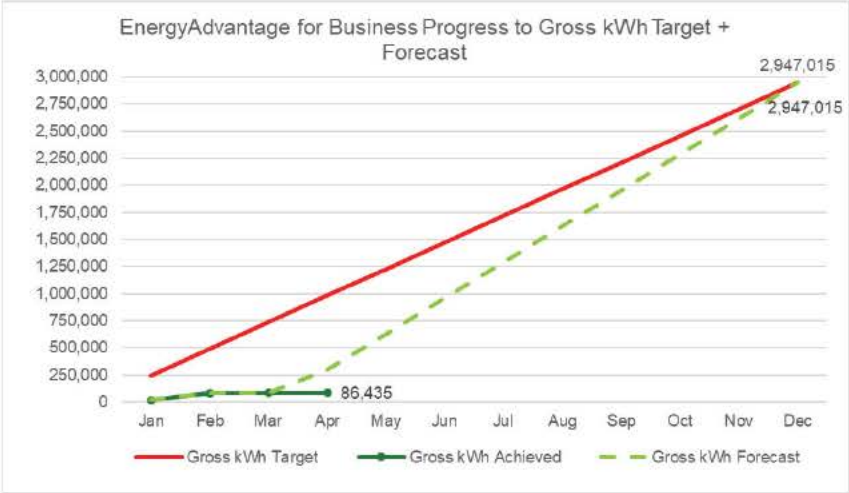
	Gross kWh	Target	%	Incentives	Budget	%
Achieved	86,435	2,947,015	3%	\$6,294	\$ 317,995	2%
2026 Pipeline	22,194	2,947,015	1%	\$1,188	\$ 317,995	0%
2026 Total	108,629	2,947,015	4%	\$ 7,482	\$ 317,995	2%

Project Pipeline & Pre Pipeline

Project Number	Site	Project Type	Project Status	Current Gross Savings kWh	Current Incentive Total	Estimated Installation Completion Date
CES2026_009561		Lighting	1-Initiation	22,194	\$1,188	6/1/2026
TOTAL				22,194	\$1,188	

Application Number	Site	Project Type	Project Status	Current Gross Savings kWh	Current Incentive Total	Estimated Installation Completion Date
CES_4272055		LIGHTING	SIGNED- READY TO BE PROCESSED	231,091	\$6,900	4/23/26
CES_7895219		LIGHTING	SIGNED- READY TO BE PROCESSED	150,913	\$4,506	4/23/26
CES_5944253		LIGHTING	SIGNED- READY TO BE PROCESSED	86,551	\$3,320	4/23/26
CES2026_009912		Lighting	6-Payment Pending	25,961	\$1,400	4/20/2026
TOTAL				494,516	\$16,126	

EnergyAdvantage For Business



2026 kWh Goal	2,947,015	% to Goal	# Projects
Actual 4.20.26	86,435	3%	9
Pipeline	22,194	1%	1
Pipeline-In Process	494,516	17%	4
Total	603,145	20%	14

	2026- Commercial kWh	Incentives
Annual	2,947,015	\$ 317,995.00
Monthly	245,584.58	\$ 26,499.58
Per Project (2025 Average)	35000	\$ 2,275.00
Per Month to meet Goal	7.02	11.6481685
	7 projects month	
	project size will vary	

[illegible]



Engagement Strategy

Discovered opportunity through on site-visit. Store manager gave corporate's phone number. Call and email sent to corporate which turned into projects.



Customer's Problem

Want to convert lights to LED but it is expensive and hard to budget for.



Program Solution

Incentives provided by EA program helped cover the cost of lights which made Food City decide to pursue conversions



Benefits

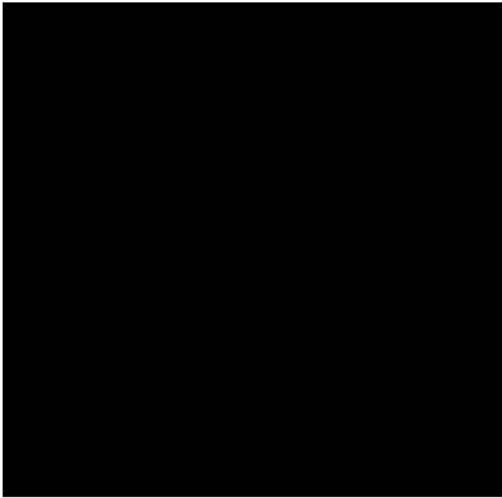
Large KWH savings at minimal cost



Results

- Incentive: \$6,900
- Gross kWh Savings: 231,091.35
- Program cost per kWh: 0.03

EnergyAdvantage For Business Program- Leads

SITE NAME	PROJECT TYPE	ANTICIPATED SUBMIT DATE
	LIGHTING	5/20
	LIGHTING	6/1
	LIGHTING	6/1
	LIGHTING	6/1
	LIGHTING	6/1
	LIGHTING	6/1
	LIGHTING	6/20
	LIGHTING	6/20
	LIGHTING	7/1
	LIGHTING	8/1

MARKETING Update



Marketing Update

• Campaigns

- Continued work on emails and social graphics
- Emails went out last Tuesday

• Website

- Finalizing combined program webpage mock-up
- Finalizing approved TA list to add to website

• Program Packet

- Creating a pack for chambers and local community associations to promote the programs

• Outreach Team Talking Points

- Working together to create talking points for outreach teams to answer questions appropriately and send customers to the right place

• Earth Right Collaboration

- Aligning closely with Earth Right to promote the programs together

• Follow Up Emails

- Created email to follow up with calls the outreach team is making (sending this week)
- Created follow up email to those who have filled out a home energy assessment form, but have not actually scheduled (pending approval)



OPERATIONS Update



Trade Allies



Air Power Energy- Rebate Processor
Commercial



American Heating & Cooling
HVAC Residential and Commercial

BriteSwitch

BriteSwitch Rebate Processor
Commercial



ROI Energy- Rebate Processor
Commercial



Appalachian Refrigeration, Heating & Cooling-
Lighting, Fixtures, and Controls Lighting - Interior
HVAC (Residential) HVAC (C&I) Insulation
(Residential)



Wesco- Lighting, Fixtures, and Controls



EAG-LED- Lighting, Fixtures, and Controls
Commercial



Diggs Lighting- Rebate Processor
Commercial

Incentive **Rebate360®**

Incentive Rebate360
Rebate Processor
Commercial



LightServe- Rebate Processor
Commercial



MW Co. LLC- Lighting, Fixtures, and Controls
Commercial



Utility Metering Solutions, LLC- Lighting, Fixtures, and
Controls
Commercial



Invoicing

May 2026						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2026						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

July 2026						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Beginning May 2026, monthly invoicing

Call Center

January 100% answer rate

February 89% answer rate with 3 calls returned

March 100% answer rate



- Continuing to make outbound calls to residential high energy users, 556 outbound calls to date

Program Contact Information

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Thank You!



SAVING ENERGY STARTS HERE



ENERGY ADVANTAGE

EnergyAdvantage Update – June 15, 2026

SAVING ENERGY STARTS HERE

Agenda

- Safety Moment
- Program Update
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Operations
- Marketing
- Wrap Up



Safety Moment

June is National Safety Month



Discussion Topics



DISCUSSION: Smart Thermostats

Input Needed –
Approved?

EnergyAdvantage for Business

- Recommend opening the smart measure up to non-ENERGY STAR® thermostats that meet the description of "advanced thermostats" from the IL TRM.
 - This would align with the TRM method that we are referencing to calculate savings for the measure.
- Changes Required: Remove "EnergyStar®" from incentive guide. Add a footnote defining the new requirements below:

Eligible thermostats are limited to the control of HVAC unitary equipment and must exceed the performance of conventional programmable thermostats through automated control capabilities. The device must automatically maintain temperature schedules and setpoints based on device inputs or environmental data beyond basic time and temperature data, provide two-way communication, and allow centralized or remote supervisory control (e.g., EMS, cloud platform, or BAS). The device must not rely solely on manual user programming.

- Also recommend allowing Guest Room Energy Management Systems (GREMS) under the smart thermostats measure. These are thermostats with automatic temperature setbacks based on guest occupancy detection
- These are covered by a separate measure in the IL TRM, so it is not an exact match. However, energy savings claimed using the smart thermostat methodology would be conservative compared to the GREMS measure



DISCUSSION: EnergyAdvantage at Home Campaign

Discussion

Example: Pending Final Approval (Amounts/Dates)

TakeCharge Virginia Home Performance Program - Instead of the \$25 gift card campaign, proposed the installation of an ENERGY STAR® air purifier during the Home Energy Assessment at no cost to the customer.



Offer would be for specified time limit to request and complete the Home Energy Assessment.

Contractor will purchase and deliver the air purifier at the completion of visit.

Product: Levoit ENERGY STAR® air purifier

Proposed Incentive: \$50

kWh savings: 260 kWh per unit

As of 6/14/26, there have been 289 new HEA requests during the initial 10 days of the Virginia Home Performance Air Purifier Campaign.

The Kentucky Power EnergyAdvantage at Home, **does not include an Air Purifier as a Rebate measure.** With interest, TRC will propose similar measure- based incentive to create immediately interest in participating.



ENERGY ADVANTAGE AT HOME

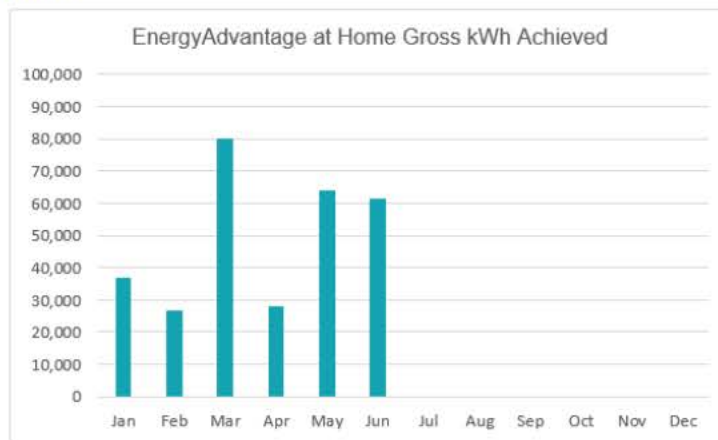


SAVING ENERGY STARTS HERE

EnergyAdvantage At Home

EnergyAdvantage At Home

55%



Projects Completed
149

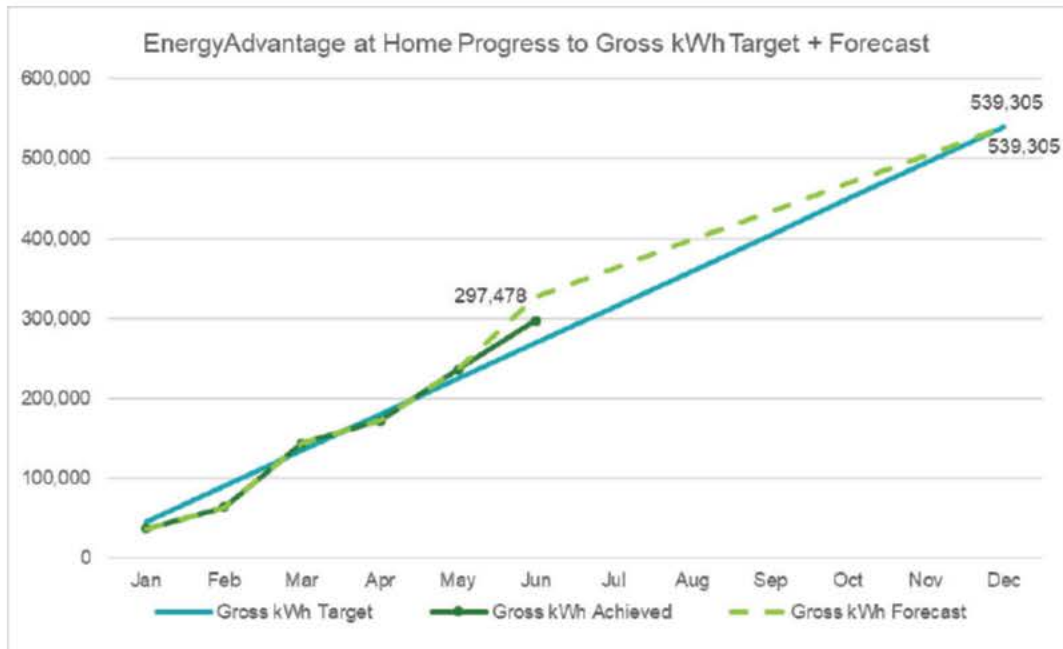
Avg. Gross kWh
1,996

Avg. Incentives
\$627

Avg. \$/Gross kWh
\$0.31

	Gross kWh	Target	%	Incentives	Budget	%
Achieved	297,478	539,305	55%	\$93,464	\$ 217,383	43%
2026 Pipeline	12,536	539,305	2%	\$3,175	\$ 217,383	1%
2026 Total	310,014	539,305	57%	\$ 96,639	\$ 217,383	44%

EnergyAdvantage At Home



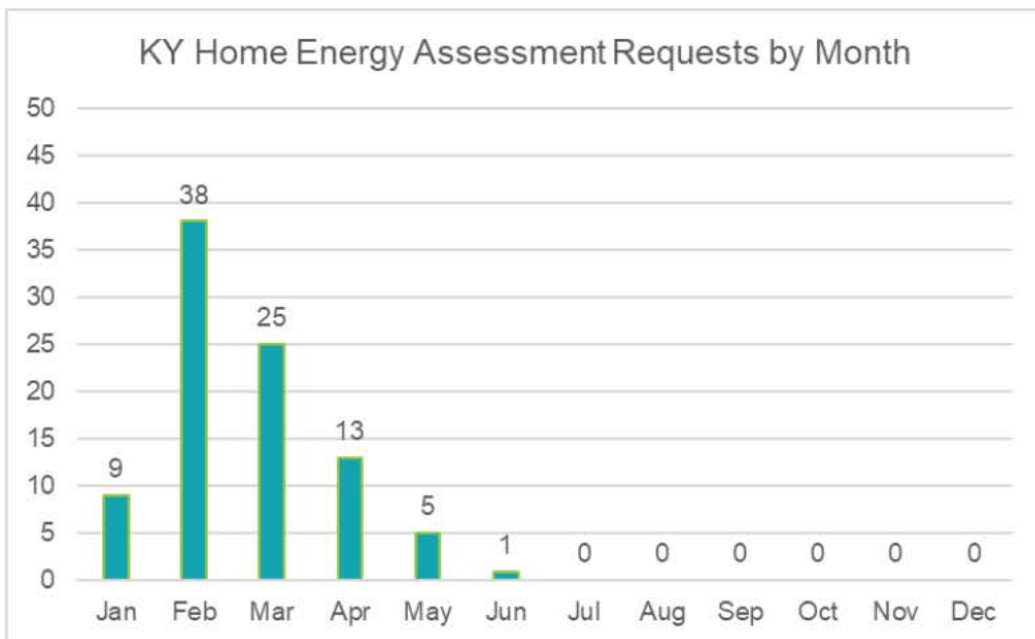
EnergyAdvantage At Home

EnergyAdvantage at Home Direct Install and Rebate Invoiced 2026

	Direct Install			Rebate			Grand Total		
	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives
Jan	11	19,538	\$7,370	8	17,298	\$4,450	19	36,836	\$11,820
Feb	7	12,915	\$4,333	2	13,979	\$730	9	26,894	\$5,063
Mar	44	80,052	\$28,580	0	0	\$0	44	80,052	\$28,580
Apr	17	27,903	\$10,523	0	0	\$0	17	27,903	\$10,523
May	32	64,156	\$19,485	0	0	\$0	32	64,156	\$19,485
Jun	27	57,837	\$17,764	1	3,800	\$230	28	61,637	\$17,994
Jul	0	0	\$0	0	0	\$0	0	0	\$0
Aug	0	0	\$0	0	0	\$0	0	0	\$0
Sep	0	0	\$0	0	0	\$0	0	0	\$0
Oct	0	0	\$0	0	0	\$0	0	0	\$0
Nov	0	0	\$0	0	0	\$0	0	0	\$0
Dec	0	0	\$0	0	0	\$0	0	0	\$0
Total	138	262,400	\$88,054	11	35,078	\$5,410	149	297,478	\$93,464

2026 Goal	539,305	\$217,383
% Achieved	55%	43%

EnergyAdvantage At Home



EnergyAdvantage for Home- Outreach

May 2026

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2026

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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

- 5/27- [REDACTED]
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- 6/10- [REDACTED]
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- 6/11- [REDACTED]



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ENERGY ADVANTAGE FOR BUSINESS

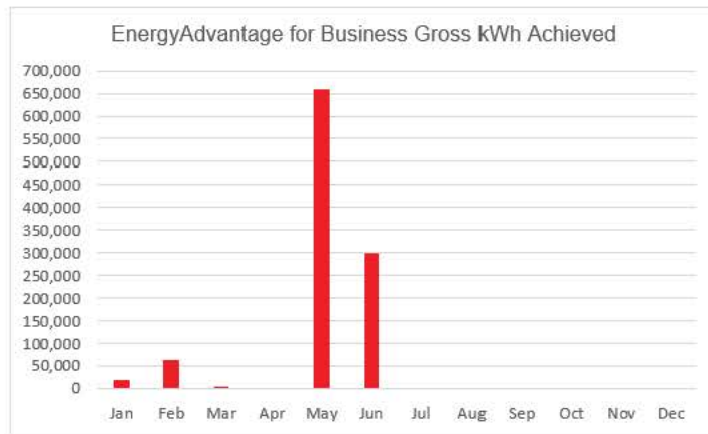


SAVING ENERGY STARTS HERE

EnergyAdvantage For Business

EnergyAdvantage for Business

35%



Projects
Completed
17

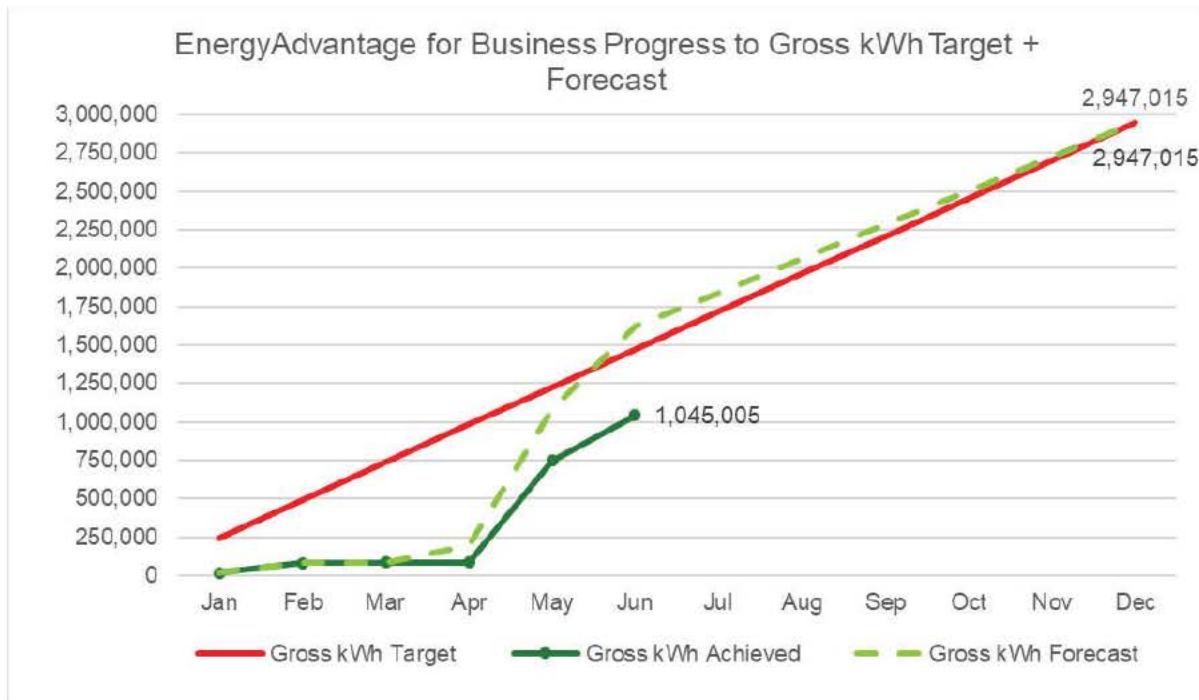
Avg. Gross
kWh
61,471

Avg. Incentives
\$1,988

Avg. \$/Gross
kWh
\$0.03

	Gross kWh	Target	%	Incentives	Budget	%
Achieved	1,045,005	2,947,015	35%	\$33,804	\$ 317,995	11%
2026 Pipeline	24,093	2,947,015	1%	\$1,288	\$ 317,995	0%
2026 Total	1,069,098	2,947,015	36%	\$ 35,092	\$ 317,995	11%

EnergyAdvantage For Business



Project Pipeline

Project Number	Site	Project Type	Project Status	Current Gross Savings kWh	Current Incentive Total	Estimated Installation Completion Date
CES2026_010358		Non-Lighting	6-Payment Pending	1,900	\$100	6/10/2026
CES2026_009561		Lighting	1-Initiation	22,194	\$1,188	6/1/2026
TOTAL				24,093	\$1,288	

EnergyAdvantage For Business Program- Customer Meetings



Green in person
Black by phone

May 2026						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2026						
S	M	T	W	T	F	S
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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

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•	5/28	[Redacted]
•	6/1	[Redacted]
•	6/1	[Redacted]
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•	6/10	[Redacted]

EnergyAdvantage For Business Program- Leads

SITE NAME	PROJECT TYPE	%	ANTICIPATED SUBMIT DATE
	LIGHTING	50%	6/20
	LIGHTING	60%	7/1
	LIGHTING	60%	8/1
	LIGHTING	70%	8/1
	LIGHTING	60%	11/1
	LIGHTING	60%	11/1
	LIGHTING	80%	11/1
	LIGHTING	60%	12/1
	LIGHTING	20%	12/1

Compassion Services Project Highlight

Category: Healthcare

Program: Commercial (CES)

Project: Parking lot light conversion

Impact: Landlord decided to convert lights to LED at request of the company. Saves money on energy bill and encourages future projects at Landlord's other buildings.



INCENTIVE

\$450



ENERGY SAVINGS

3,872.70



PAYBACK PERIOD

8.4 years



ROI

137%

MARKETING Update



Marketing Update

- **Collateral**
 - Home Program Posters & Tabletop Signs
- **Campaigns/Emails**
 - 5 emails scheduled out
 - Working on the next site
 - On-going email sends to phone call follow ups and unscheduled home energy assessments
- **Website**
 - Working through website changes with Sarah
 - Finalizing approved TA list to add to website
- **Program Packet**
 - Creating a pack for chambers and local community associations to promote the programs
- **Outreach Team Talking Points**
 - Sarah working on these for us



ENERGY ADVANTAGE FOR HOME

Saving Energy Starts Here

We've been trying to reach you about your interest in the Kentucky Power EnergyAdvantage for Home program, and we don't want you to miss out.

Your interest in our no-cost Home Energy Assessment, includes free upgrades that can start saving you money right away, such as:

- Airway Sealing for interior and exterior windows and doors
- High-efficiency showerheads to lower water heating costs
- Faucet aerators for everyday savings
- Additional efficiency improvements based on your home

During your visit, our team will also:

- Identify energy-saving opportunities throughout your home
- Check for potential health and safety concerns
- Provide a personalized plan to help lower your energy bills

To schedule your assessment, call us at **606.268.4109**, or click the button below to request a time that works best for you.

We'd love to help you take advantage of these savings while they're still available.

[Email to Schedule a Home Assessment](#)

We look forward to hearing from you
Kentucky Power EnergyAdvantage at Home Program Team

KentuckyPower.com/Savings | 844.657.1239 | EnergyAdvantageKentucky@TRCCompanies.com

OPERATIONS Update



Monthly Invoicing

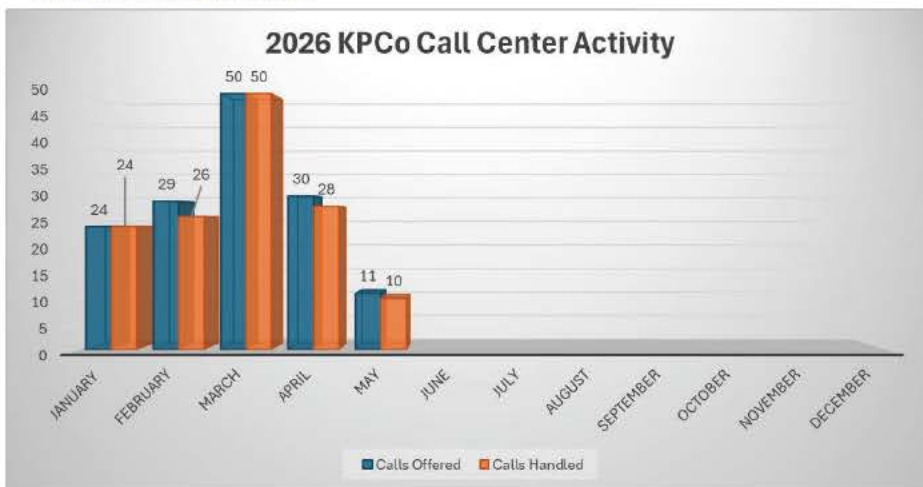
July 2026						
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

August 2026						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

September 2026						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Call Center

January 100% answer rate
February 89% answer rate with 3 calls returned
March 100% answer rate
April 93% answer rate
May 91% answer rate



- Continuing to make outbound calls to residential high energy users, 787 outbound calls to date following up with email for program awareness.

Trade Allies



Air Power Energy- Rebate Processor
Commercial



Energy Management Collaborative, LLC
Going to send signed agreement



BriteSwitch Rebate Processor
Commercial



ROI Energy- Rebate Processor
Commercial



Appalachian Refrigeration, Heating & Cooling-
Lighting, Fixtures, and Controls Lighting - Interior
HVAC (Residential) HVAC (C&I) Insulation
(Residential)



Wesco- Lighting, Fixtures, and Controls



American Heating & Cooling
HVAC Residential and Commercial



EAG-LED- Lighting, Fixtures, and
Controls
Commercial



Diggs Lighting- Rebate Processor
Commercial



Incentive Rebate360
Rebate Processor
Commercial



LightServe- Rebate Processor
Commercial



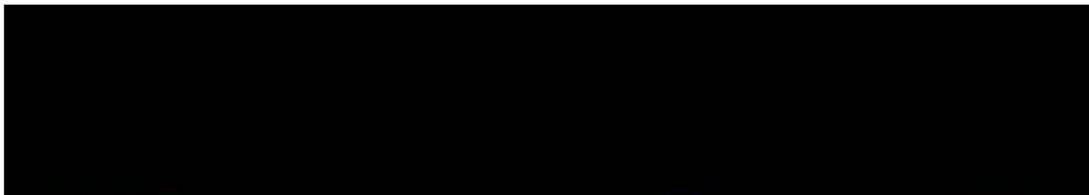
MW Co. LLC- Lighting, Fixtures, and Controls
Commercial



Utility Metering Solutions, LLC- Lighting, Fixtures, and
Controls
Commercial



Program Contact Information



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Fran Phillips

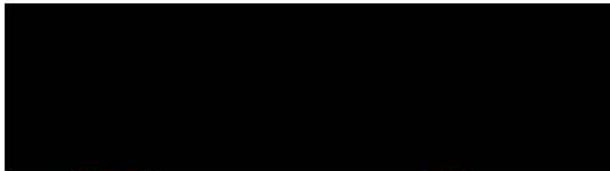
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Thank You!



SAVING ENERGY STARTS HERE

**KENTUCKY
POWER**SM

An **AEP** Company

ENERGY ADVANTAGE

Update - May 18, 2026



Agenda

- Safety Moment
- Discussion Items
- Program Update
 - EnergyAdvantage At Home
 - EnergyAdvantage For Business
- Marketing
- Operations
- Wrap Up

Safety Moment

Stress management:

- Deep breathing
- Time management
- Exercise
- Eating healthy
- Get outside
- Unplug



Discussion Topics



DISCUSSION: Smart Thermostats

Input Needed –
Approved?

EnergyAdvantage for Business

- Recommend opening the smart measure up to non-ENERGY STAR® thermostats that meet the description of "advanced thermostats" from the IL TRM.
 - This would align with the TRM method that we are referencing to calculate savings for the measure.
- Changes Required: Remove "EnergyStar®" from incentive guide. Add a footnote defining the new requirements below:

Eligible thermostats are limited to the control of HVAC unitary equipment and must exceed the performance of conventional programmable thermostats through automated control capabilities. The device must automatically maintain temperature schedules and setpoints based on device inputs or environmental data beyond basic time and temperature data, provide two-way communication, and allow centralized or remote supervisory control (e.g., EMS, cloud platform, or BAS). The device must not rely solely on manual user programming.

- Also recommend allowing Guest Room Energy Management Systems (GREMS) under the smart thermostats measure. These are thermostats with automatic temperature setbacks based on guest occupancy detection
- These are covered by a separate measure in the IL TRM, so it is not an exact match. However, energy savings claimed using the smart thermostat methodology would be conservative compared to the GREMS measure



DISCUSSION: Kitchen Equipment

Input Needed – Date To Announce

Timeline to start marketing the new Food Service measures for 2027

Food Service & Misc. Incentives		
Measure		Incentive Cap
Commercial Combination Oven	Pan Capacity ≤ 14	\$600 per Oven
	Pan Capacity 15 - 29	\$1,000 per Oven
	Pan Capacity ≥ 30	\$1,430 per Oven
Commercial Electric Fryer	Large and Standard Vat	\$500 per Fryer
Commercial Electric Steam Cooker	3-Pan Capacity	\$900 per Cooker
	4-Pan Capacity	\$1,000 per Cooker
	5-Pan Capacity	\$1,200 per Cooker
	≥ 6-Pan Capacity	\$1,380 per Cooker
Commercial Dishwasher		\$220 per Dishwasher



DISCUSSION: EnergyAdvantage at Home Campaign

Discussion

Example: Pending Final Approval (Amounts/Dates)

TakeCharge Virginia Home Performance Program - Instead of the \$25 gift card campaign, proposed the installation of an ENERGY STAR® air purifier during the Home Energy Assessment at no cost to the customer.

Offer would be for specified time limit to request and complete the Home Energy Assessment.

Contractor will purchase and deliver the air purifier at the completion of visit.

Product: Levoit ENERGY STAR® air purifier

Proposed Incentive: \$50

kWh savings: 133 kWh per unit



The Kentucky Power EnergyAdvantage at Home, does not include an Air Purifier as a Rebate measure.

With interest, TRC will propose similar measure- based incentive to create immediately interest in participating.

DISCUSSION: 2025 Incentive Budget

Discussion

What is the process for reaching back to 2025 incentive budget?

Current 2026 (including pipeline projects)

Home – 50%

Commercial – 41%

Discuss timing/process to request



ENERGY ADVANTAGE AT HOME

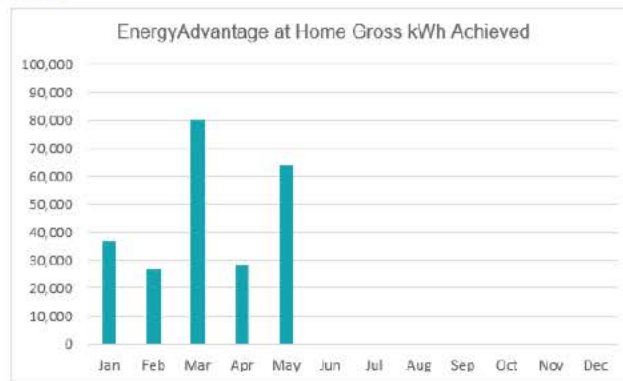


SAVING ENERGY STARTS HERE

EnergyAdvantage At Home

EnergyAdvantage At Home

44%



	Gross kWh	Target	%	Incentives	Budget	%
Achieved	235,841	539,305	44%	\$75,470	\$ 217,383	35%
2026 Pipeline	35,283	539,305	7%	\$10,188	\$ 217,383	5%
2026 Total	271,124	539,305	50%	\$ 85,658	\$ 217,383	39%

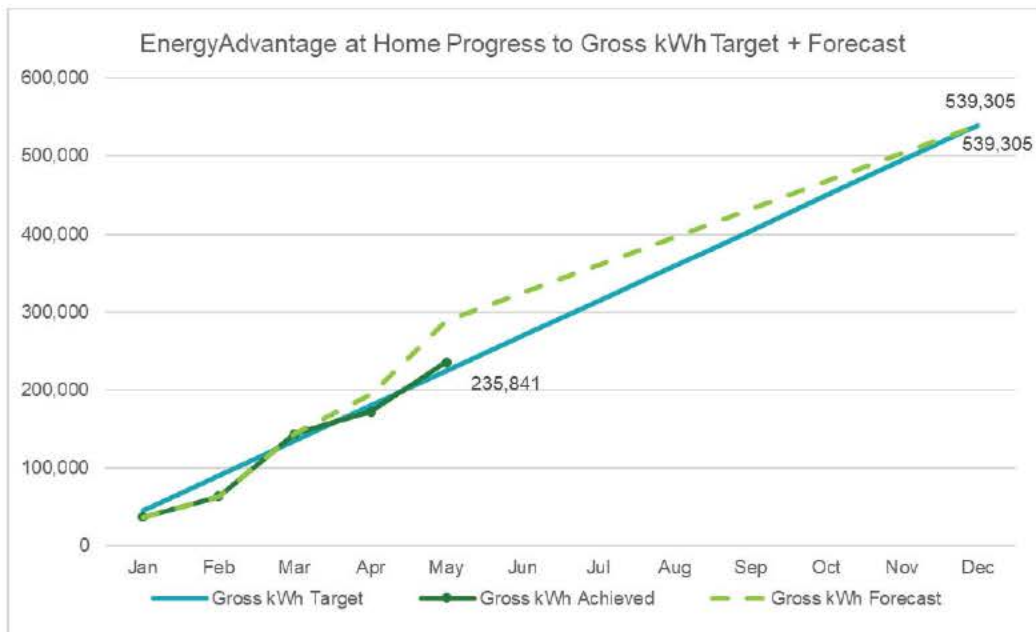
Projects Completed
121

Avg. Gross kWh
1,949

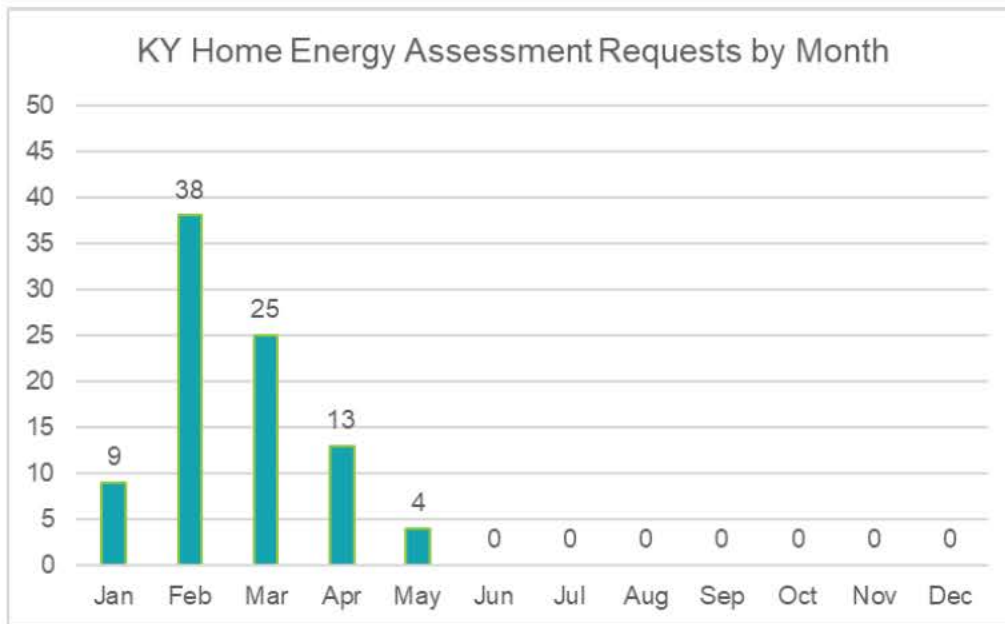
Avg. Incentives
\$624

Avg. \$/Gross kWh
\$0.32

EnergyAdvantage At Home



EnergyAdvantage At Home



EnergyAdvantage At Home

EnergyAdvantage at Home Direct Install and Rebate Invoiced 2026

	Direct Install			Rebate			Grand Total		
	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives	Projects	kWh Savings	Incentives
Jan	11	19,538	\$7,370	8	17,298	\$4,450	19	36,836	\$11,820
Feb	7	12,915	\$4,333	2	13,979	\$730	9	26,894	\$5,063
Mar	44	80,052	\$28,580	0	0	\$0	44	80,052	\$28,580
Apr	17	27,903	\$10,523	0	0	\$0	17	27,903	\$10,523
May	32	64,156	\$19,485	0	0	\$0	32	64,156	\$19,485
Jun	0	0	\$0	0	0	\$0	0	0	\$0
Jul	0	0	\$0	0	0	\$0	0	0	\$0
Aug	0	0	\$0	0	0	\$0	0	0	\$0
Sep	0	0	\$0	0	0	\$0	0	0	\$0
Oct	0	0	\$0	0	0	\$0	0	0	\$0
Nov	0	0	\$0	0	0	\$0	0	0	\$0
Dec	0	0	\$0	0	0	\$0	0	0	\$0
Total	111	204,564	\$70,290	10	31,277	\$5,180	121	235,841	\$75,470
2026 Goal								539,305	\$217,383
% Achieved								44%	35%



An **AEP** Company

ENERGY ADVANTAGE FOR BUSINESS

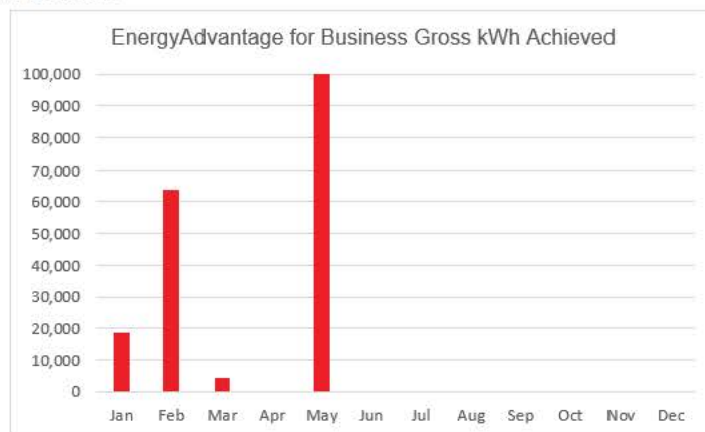


SAVING ENERGY STARTS HERE

EnergyAdvantage For Business

EnergyAdvantage for Business

25%



Projects
Completed
14

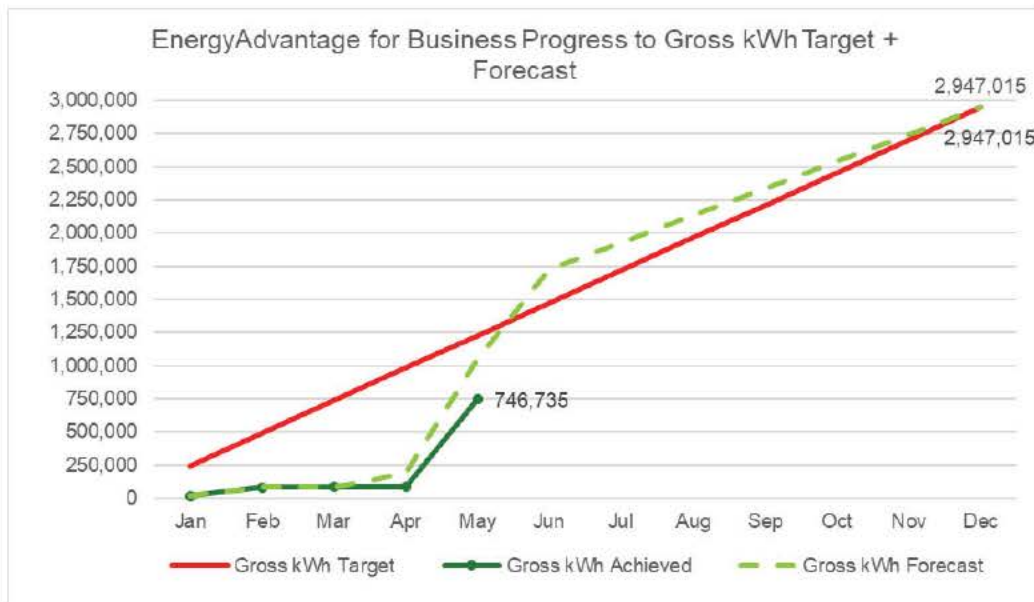
Avg. Gross
kWh
53,338

Avg. Incentives
\$1,955

Avg. \$/Gross
kWh
\$0.04

	Gross kWh	Target	%	Incentives	Budget	%
Achieved	746,735	2,947,015	25%	\$27,370	\$ 317,995	9%
2026 Pipeline	468,823	2,947,015	16%	\$11,928	\$ 317,995	4%
2026 Total	1,215,558	2,947,015	41%	\$ 39,298	\$ 317,995	12%

EnergyAdvantage For Business



Project Pipeline & Pre Pipeline

Project Number	Site	Project Type	Project Status	Current Gross Savings kWh	Current Incentive Total	Estimated Installation Completion Date
CES2026_009561		Lighting	1-Initiation	22,194	\$1,188	6/1/2026
CES2026_010007		Lighting	1-Initiation	150,913	\$4,506	6/2
CES2026_010199		Lighting	1-Initiation	216,623	\$3,120	6/2
CES2026_010201		Lighting	1-Initiation	79,094	\$3,114	6/2
TOTAL				468,823	\$11,928	



Date	Number of Cases (approximate)
4/28	15
4/29	45
4/29	75
4/29	85
4/29	100
4/29	65
4/29	60
4/29	65
4/29	85
4/29	55
4/29	90
4/30	55
5/4	60
5	10
5/4	45
5/4	45
5/6	70
5/7	85
5/7	65

EnergyAdvantage For Business Program- Leads

SITE NAME	PROJECT TYPE	ANTICIPATED SUBMIT DATE
	LIGHTING	6/1
	LIGHTING	7/1
	LIGHTING	7/1
	LIGHTING	7/1
	LIGHTING	8/1
	LIGHTING	9/1
	LIGHTING	11/1
	LIGHTING	11/1
	LIGHTING	11/1
	LIGHTING	12/1
	LIGHTING	12/1
	LIGHTING	12/1

Category: Retail/Grocery

Program: Kentucky Power Energy Advantage

Project: LED Light Conversion

Impact: Program incentives encouraged owner to convert multiple locations. Saving millions of annual KWH combined.



INCENTIVE

\$3,120.00



ENERGY SAVINGS

216,623



PAYBACK PERIOD

0.6 year



ROI

1,599%

MARKETING Update



Marketing Update

• Campaigns

- 5 emails out for review/approval

• Website

- Completed home page and combined program webpage mock-up, pending working with IT team for creation
- Finalizing approved TA list to add to website

• Program Packet

- Creating a pack for chambers and local community associations to promote the programs

• Outreach Team Talking Points

- Working together to create talking points for outreach teams to answer questions appropriately and send customers to the right place

2026							
Time Sent	Campaign Name	Sends	Opens	Open Rate	Clicks	Click Rate	Subject Lines
2/5/2026 11:53	Q1 2026 Business 1	5,172	1,845	42.50%	62	1.40%	Prepare your Business for the Season
2/17/2026 12:14	Q1 2026 Business 2	5,164	1,756	40.50%	25	0.60%	Smarter Energy Savings for Your Business
3/3/2026 10:20	Q1 2026 Business 3	5,156	1,692	39.20%	24	0.60%	Is Your Business Ready for a More Efficient Year?
4/14/2026 8:30	Bus March #1 - Lower Business Overhead	5,228	1,664	38.20%	76	1.70%	Lowering Energy Costs for Your Business Starts Here
2/5/2026 11:52	Q1 2026 Home 1	52,528	18,766	39.30%	350	0.70%	Start the New Year with Smart Energy Savings
2/17/2026 12:13	Q1 2026 Home 2	52,438	18,518	38.90%	94	0.20%	Lower Bills, Greater Comfort - All Year long
3/3/2026 10:24	Q1 2026 Home 3	52,345	17,036	35.90%	244	0.50%	Is Your Home Ready for a More Efficient Year?
4/14/2026 6:00	Home March #1 - Spring Assessment	52,208	16,549	35.10%	140	0.30%	Spring is the Perfect Time to Save Energy at Home
4/23/2026 9:17	Q4.2026 Home Assessment Calling Follow-up	601	214	41.60%	9	1.70%	Follow-up: Cut Energy Costs with a Free Home Energy Assessment

Marketing Update – Earth Right Alignment

- **YMCA Community Events**
 - Focusing on Ashland first
- **Website landing page on their website**
- **Vehicle Wraps**
- **Dual-Brand Apparel**
- **Referral Program**
 - See document to the right
- **Community Outreach**
- **Public Speaking Engagements**



Request for Approval of Contractor Referral Gift Card Program

To the Team at TRC and Kentucky Power,

Earth Right Mid-Atlantic would like to formally request approval to implement a contractor-operated customer referral incentive program related to the Kentucky Power Program.

Under this proposed program, Earth Right Mid-Atlantic would provide a **\$20 referral gift card** to existing customers who refer homeowners or renters located within the Kentucky Power service territory, provided that the referred customer ultimately moves forward and completes work through the Kentucky Power Program with our company.

We would also like to clearly establish the following terms and conditions regarding this referral incentive program:

- The referral gift card program is operated solely and independently by Earth Right Mid-Atlantic.
- The program is not sponsored, administered, funded, or endorsed by TRC or Kentucky Power.
- All marketing materials, customer communication, and terms and conditions will specifically state that the referral gift card is being provided directly by Earth Right Mid-Atlantic.
- Any questions, concerns, or communication regarding referral payments or gift cards will be handled exclusively through Earth Right Mid-Atlantic's office and staff.
- Customers will be instructed not to contact TRC or Kentucky Power regarding referral incentives, payments, or related issues.
- Earth Right Mid-Atlantic will issue referral gift cards within approximately two weeks following the successful completion and installation of the referred project.
- The referral program is intended strictly as a contractor-driven marketing initiative to help generate additional participation and enrollment within the Kentucky Power Program service area.

We believe this initiative can help increase customer participation, improve program awareness, and encourage additional energy efficiency projects throughout the Kentucky Power territory while maintaining a clear separation between contractor-sponsored marketing efforts and utility program administration.

OPERATIONS Update



Trade Allies



Air Power Energy- Rebate Processor
Commercial



American Heating & Cooling
HVAC Residential and Commercial

BriteSwitch

BriteSwitch Rebate Processor
Commercial



ROI Energy- Rebate Processor
Commercial



Appalachian Refrigeration, Heating & Cooling-
Lighting, Fixtures, and Controls Lighting - Interior
HVAC (Residential) HVAC (C&I) Insulation
(Residential)



Wesco- Lighting, Fixtures, and Controls



EAG-LED- Lighting, Fixtures, and Controls
Commercial



Diggs Lighting- Rebate Processor
Commercial

Incentive **Rebate360®**

Incentive Rebate360
Rebate Processor
Commercial



LightServe- Rebate Processor
Commercial



MW Co. LLC- Lighting, Fixtures, and Controls
Commercial



Utility Metering Solutions, LLC- Lighting, Fixtures, and
Controls
Commercial



Monthly Invoicing

June 2026						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

July 2026						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

August 2026						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

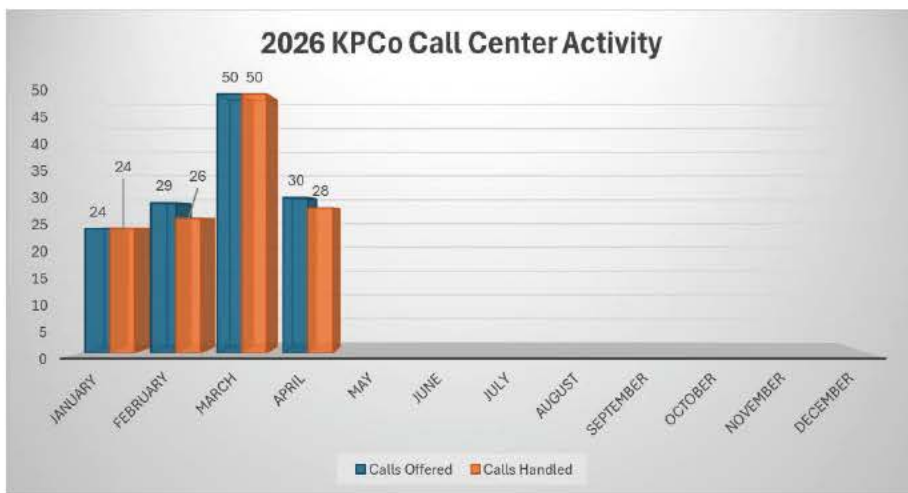
Call Center

January 100% answer rate

February 89% answer rate with 3 calls returned

March 100% answer rate

April 93% answer rate



- Continuing to make outbound calls to residential high energy users, 773 outbound calls to date (271 since last report) and following up with email for program awareness.

Program Contact Information

Deborah Hill

Program Director
252 801-6861
Dhill@trccompanies.com

Fran Phillips

Operations Manager
301-275-7427
Fphillips@trccompanies.com

Peter Hyson

Engineering Manager
540-666-8437
phynson@trccompanies.com

Issac Finn

Outreach
859-417-2802
ifinn@trccompanies.com

Erica Tieman

Associate Marketing Director
ETieman@trccompanies.com

Program Phone: 844-657-1230

Program Email: EnergyAdvantageKentucky@TRCcompanies.com





Thank You!

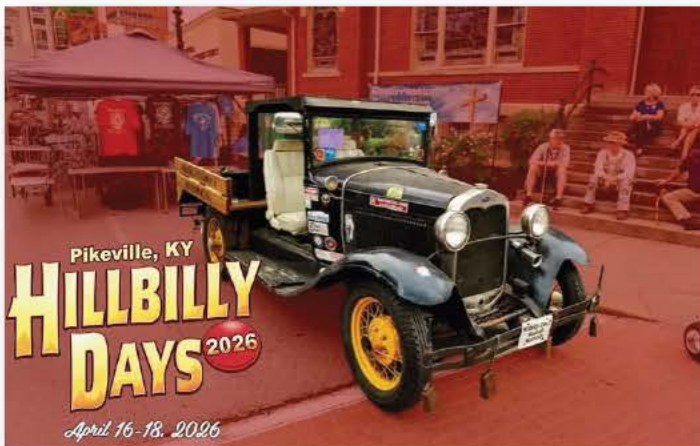


SAVING ENERGY STARTS HERE

2026 Events

Past Events

- Hill Billy Days April 16-17
- Hazard Community and Technical College - March 25



DISCUSSION: EnergyAdvantage at Home Self Install Measures

Approved

- Smart Thermostat
- Room AC

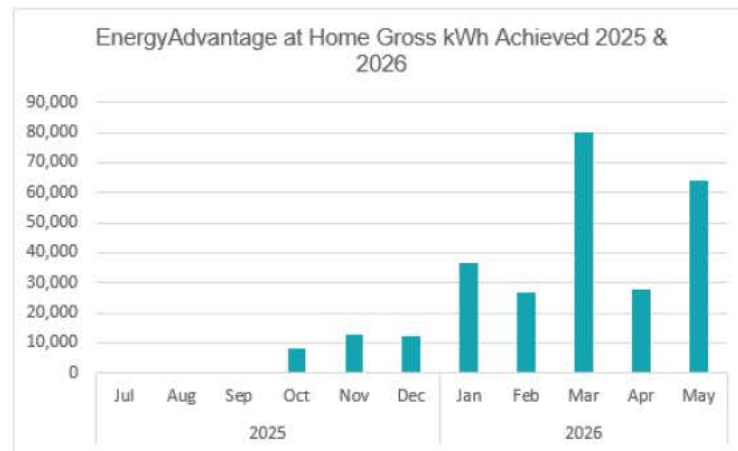
Program guidelines remain consistent for the rebate:

1. Home must have electric heat to qualify. (Smart Thermostat)
2. Rebate request and supporting documentation must be presented within 60 days of purchase. (Smart Thermostat and Room AC)
3. Purchased equipment must be ENERGY STAR® (Smart Thermostat and Room AC)
4. The rebate amount will not exceed to purchase price of the new equipment (Smart Thermostat and Room AC)



Completed EnergyAdvantage At Home- 2025-2026 Total

EnergyAdvantage At Home



	Projects	Gross kWh	Incentives
2025 Achieved	20	33,334	\$14,864
2026 Achieved	121	235,841	\$75,470
2026 Pipeline	16	35,283	\$10,188
2025 & 2026 Total	157	304,458	\$ 100,522

EnergyAdvantage At Home

Eff Equip Description	Pipeline			2026			2025			Grand Total		
	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives	Units	Gross Savings kWh	Incentives
60 Gallon Domestic Hot Water Heater Tank Wrap	2	545	\$150	9	2,457	\$675	3	819	\$220	14	3,822	\$1,045
80 Gallon Domestic Hot Water Heater Tank Wrap							1	348	\$75	1	348	\$75
Advanced Power Strip - Tier 1	27	2,160	\$675	161	12,880	\$4,250	92	7,360	\$2,520	280	22,400	\$7,445
Air Sealing with Blower Door - AC and Electric Resistance Heat	2	1,705	\$640	12	14,405	\$3,840	2	1,890	\$640	16	18,000	\$5,120
Air Sealing with Blower Door - Heat Pump	12	13,917	\$3,800	87	84,723	\$27,820	15	6,423	\$4,740	114	105,063	\$36,360
Air Sealing with Blower Door - No AC and Electric Resistance Heat				2	1,857	\$640	1	244	\$320	3	2,101	\$960
Air Source Heat Pump - Tier 1 - Split System				6	5,835	\$2,400	2	940	\$800	8	6,776	\$3,200
Air Source Heat Pump - Tier 2 - Single Package				1	1,846	\$500				1	1,846	\$500
Air Source Heat Pump - Tier 2 - Split System				5	13,375	\$500				5	13,375	\$500
Attic Insulation - Heat Pump				1	604	\$230				1	604	\$230
Caulking, Sealing, or Polyethylene Tape (Between Conditioned and Unconditioned Space)	300	966	\$225	492	1,584	\$369				792	2,550	\$594
Central Air Conditioner - Tier 1 - Split System				1	242	\$200				1	242	\$200
Door Sweep	6	351	\$120	26	1,523	\$650				32	1,874	\$770
Door Weatherstripping	2	8	\$6	52	196	\$156				54	204	\$162
Duct Sealing	14	15,007	\$2,075	100	84,488	\$14,790	17	13,491	\$2,550	131	112,966	\$19,415
Ductless Heat Pump - Multi Zone				1	1,618	\$400				1	1,618	\$400
Ductless Heat Pump - Single Zone				2	1,770	\$400				2	1,770	\$400
Heat Pump Water Heater				1	5,188	\$500				1	5,188	\$500
Outlet Gasket	10	38	\$25	60	226	\$300	5	19	\$25	75	282	\$350
R-3 Insulation of 1/2 thickness on 1/2" DHW Pipe	13	543	\$52				6	251	\$24	19	794	\$76
Smart Thermostat				1	799	\$50	2	1,549	\$100	3	2,349	\$150
Switch Gasket	11	41	\$30	60	226	\$300				71	267	\$330
Whole Home Assessment	16	0	\$2,390	110		\$16,500	19		\$2,850	145	0	\$21,740
Grand Total	415	35,283	\$10,108	1,190	235,841	\$75,476	165	33,334	\$14,884	1,770	304,458	\$100,522

EnergyAdvantage for Home- Outreach

April 2026						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- 4/29-[REDACTED]
- 4/29-[REDACTED]
- 4/29-[REDACTED]
-

May 2026						
S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Earth Right Mid-Atlantic - Energy Assessment

Lighting

Percentage of lighting that is currently LED? _____

Location	Lighting Type	EnergyStar?	Watts	QTY	Is it Functional?	Notes

Notes:

Heating-

Location	Equipment Type	Approx. Age	Fuel Source	Heating Capacity (Btu)	QTY	Functional?	% of Heat Load	# of Air Filters

Notes:

Cooling -

Location	Equipment Type	Approx. Age	Fuel Source	Heating Capacity (Btu)	SEER	EER	QTY	Functional?	% of Cooling Load	# of Air Filters

Notes:

Thermostats-

Location	Thermostat Type	Heating Setpoint - Low (degree)	Heating Setpoint - High (degree)	Cooling Setpoint - Low (Degree)	Cooling Setpoint - High (degree)

Notes:

Duct Sealing-

% of Duct work in Conditioned Space?	Ductwork Condition ? (any leaks?)	Cooling Equipment Type	Cooling Capacity (btu)	SEER	Heating Equipment Type	Heating Capacity (Btu)	Efficiency (HSPF)

Notes:

Insulation-

Location	Area (Square Footage)	Condition	Existing R Value	Recommended R Value

Notes:

Air Sealing-

# of Exterior Doors needing Weather Stripping	# of Windows Needing Weather Stripping	# of Penetrations Needing Sealing	Estimated Number of Linear Ft. Needing Caulking/Sealing/Weather Stripping	# of Outlets Needing Gaskets

Blower Door Test -

Area (SQFT)	Conditioned Air Volume	Building Air Flow Standard (BAS) CFM50 Pre	Building Air Flow Standard (BAS) CFM50 Post

Notes:

Home Hot Water Heater

Location	System Type	Age	Fuel	Energy Factor	Temp Setting	# of kitchen sinks	# of showers	Are hot water pipes insulate d?	Is DHW tank wrapped or insulated ?	Is DHW tank Hot to the touch?

Notes:

Appliances

Location	Appliance	EnergyStar?	Approx. Age	Functional?	Fuel Source

Notes:

Health and Safety Conditions Acknowledgement

Ventilation Conditions Observed

High Ambient CO Levels? (If Yes, note the location below)	Yes	No
Potential Explosive Condition may develop? (If yes, identify in additional comments section below)	Yes	No
Unvented Space Heater? (e.g., Propane, Kerosene)	Yes	No
Unvented Dryer?	Yes	No
Gas Leak? (if Yes, provide date, time, and reference number in the comments section below)	Yes	No

Ventilation comments:

Moisture Conditions Observed (Indicate all that apply)

Inadequate Ventilation?	Yes	No
Incorrect Venting?	Yes	No
Mold/Mildew Present?	Yes	No
Conditions exist for Mold or Mildew to Develop?	Yes	No
Standing Water?	Yes	No
Condensation?	Yes	No
Rot?	Yes	No

Additional Comments:

Other Health and Safety Conditions (Indicate “Yes” on all concerns)

Indoor Air Quality?	Yes	No
Structural?	Yes	No
Sewer?	Yes	No
Asbestos?	Yes	No
Vermiculite Insulation?	Yes	No
Electrical?	Yes	No
Infestation?	Yes	No

Additional Comments:

Suggested Actions (Select “Yes” to for options that you would recommend)

Clean/Repair Furnace/Boiler Vent and/or Chimney	Yes	No
Clean/Repair Water Heater Vent And/Or Chimney	Yes	No
Have Furnace/Boiler Serviced To Reduce CO Levels	Yes	No
Have Hot Water Heater Serviced to Reduce CO Levels	Yes	No
Clean Oven/Stove	Yes	No
Remove Unvented Heater	Yes	No
Have Flooding in Basement Corrected	Yes	No
Preset These Findings to Landlord	Yes	No

Additional Comments:

2025 Home Performance (KY) Incentives

Whole Home Assessment _____150 per home

Air sealing w/ Blower door (15+ year old home)_____320 per home

10% reduction w/ blower door

36" Doorsweep (2 per home if no blower door is completed) ____25 each

Outlet gaskets (10 per home if no blower door is completed) ____5 each

Power Strip (up to five per home) _____30 each

Water heater wrap (1 per home) _____75 each

Pipe wrap _____4 per foot

Low flow shower head (3 per home) _____20 each

Duct sealing_____150 per home



Kentucky Power EnergyAdvantage at Home On-Site Workorder - Measure Install Confirmation

HEA #: _____

Installation Date / Time: _____

Customer / Site Information	
Name:	Phone:
Address:	Email:

Installed Measures			
Category	Measure	Quantity	Unit
Hot Water	1.0 GPM Bathroom Faucet Aerator (Electric Water Heating only)		Each
Hot Water	1.5 GPM Kitchen Faucet Aerator (Electric Water Heating only)		Each
Hot Water	1.5 GPM Low Flow Showerhead (Electric Water Heating only)		Each
Hot Water	Electric Hot Water Heater Thermostat Setback		Each
Insulation	30 Gallon Domestic Hot Water Tank Wrap (Electric Water Heating only)		Each
Insulation	40 Gallon Domestic Hot Water Tank Wrap (Electric Water Heating only)		Each
Insulation	60 Gallon Domestic Hot Water Tank Wrap (Electric Water Heating only)		Each
Insulation	80 Gallon Domestic Hot Water Tank Wrap (Electric Water Heating only)		Each
Insulation	R-3 Insulation of 1/2" DHW Pipe (Electric Water Heating Only)		Linear Foot
Insulation	R-3 Insulation of 3/4" DHW Pipe (Electric Water Heating Only)		Linear Foot

Installed Measures			
Category	Measure	Quantity	Unit
Insulation	Caulking, Sealing or Polyethylene Tape		Linear Foot
Insulation	Outlet Gaskets		Gasket
Insulation	Switch Gaskets		Gasket
Insulation	Door Sweep 36"		Each
Insulation	Window Weatherstripping		Each
Insulation	Door Weatherstripping		Each
Other	Advanced Power Strip		Each

Terms and Conditions

These Terms and Conditions require a signature from the authorized Kentucky Power EnergyAdvantage at Home Program customer at whose property the Home Energy Assessment (HEA) was performed.

Program Rules, Requirements, Terms and Conditions

The Kentucky Power EnergyAdvantage at Home Program (Program) is administered by Kentucky Power and implemented by TRC Solutions, Inc. (TRC). The Program provides financial incentives to encourage residential customers to install qualifying energy efficiency measures.

For a customer to be eligible for the Program they must have an active residential account in the Kentucky Power service territory. Participation is limited to once per account number. The residence must have electric HVAC to be eligible.

I understand that submitting a request for a Home Energy Assessment (HEA) gives TRC permission to access limited account information to ensure my eligibility and receipt of the direct install measures. My participation in the HEA will identify potential energy savings resulting front work performed, or additional services offered though the Program. I understand that information contained in this form shall be used solely for Program purposes and shall not be released to any outside parties, except as required by law.

I acknowledge that the Kentucky Power EnergyAdvantage at Home Program representatives have completed the home assessment and installed measures in my home for energy savings and improvement of my home's health, safety, and comfort. I acknowledge that the benefit and installation of these measures was discussed with me prior to installation during the assessment phase and that additional measures were recommended, as determined by the Contractor, and incentives offered without additional obligation.

I understand that Kentucky Power reserves the right to restrict services and to make changes to the Program at any time and for any reason without prior notice. I understand this application does not guarantee that assistance will be granted. Program participation and eligibility for installed measures is dependent in part upon the number of applications received, the remaining funds available, and the priorities to be met.

Customer Information Release Terms and Conditions Acknowledgement

By my signature below and as a condition of participating in the Program, I represent, certify, acknowledge, and/or agree, as applicable:

Terms and Conditions

- (1) I am the owner or an authorized representative of the Customer, which is the owner or operator of the facility associated with the Kentucky Power Home Energy Solutions Program, known as EnergyAdvantage at Home Program (Program) account number(s) on this application.
- (2) TRC and Kentucky Power Program are authorized to access energy usage data for the specified account(s) at the physical site address of the Project listed above, and to release the data to the Trade Ally listed on this application.
- (3) TRC and Kentucky Power Program are authorized to include my (Customer's) name, city, or county of business, Program services/incentives, and resulting energy savings in reports or other documents submitted to the Program and agencies administering energy efficiency Programs.
- (4) This acknowledgement report includes complete and accurate information about the Customer and the energy efficiency measures installed.
- (5) I (Customer) am eligible for the Program.
- (6) **I (Customer) have read and understand, and, in exchange for the benefit of participating in the Program, I (Customer) accepts and will comply with, the Program Rules, Requirements, Terms and Conditions, including, but not limited to, the release, disclaimer of warranty, limit of liability, waiver, and indemnity provisions.**
- (7) Upon submission of this form, an agreement is formed between TRC and the Customer that incorporates the Program Rules, Requirements, and Terms and Conditions.
- (8) Program offerings, including incentive payments and availability, are subject to change without notice.
- (9) My (Customer's) signature below has the same force and effect as an original manual signature.

Print Name

Signature

Date



Building Energy Assessment Report

Date of Assessment: _____

Customer Contact Information			
Name		Title	
Email		Phone	

Site Information					
Account #			Address		
Account Name			Building Type		
Number of Accounts in Building			Building Square Footage		
Annual Operating Hours			Rent or Own		
Year Built			Operating Hours		
Water Heating Type	☐ Electric ☐ LP Gas ☐ Oil	☐ Natural Gas ☐ Steam	Space Condition- ing Type	☐ AC w/ Electric Heat ☐ Heat Pump ☐ Natural Gas Heat Only	☐ AC w/ Natural Gas Heat ☐ Electric Heat Only ☐ Unconditioned
Average Annual \$/kWh			Annual kWh		
Peak Demand kW			Rate Code		
# of Employees	1-10	11-50	51+		

Building Description & Summary

Energy Assessment Summary
The three most impactful energy efficiency upgrades recommended for this site are:
1
2
3

--	--	--	--	--	--

[illegible]

2026 Incentive

**Est. Energy Savings are factored by deemed calculations from the Kentucky Power EnergyAdvantage for Business incentive guide. These estimates may not truly reflect your facility.*

Lighting Recommendations

Refrigeration Recommendations

Miscellaneous Equipment						
Category	Manufacturer	Model No.	Qty.	Gallons	Controls/ VFDs?	2026 Incentive

Miscellaneous Equipment Recommendations

Thank you for the opportunity to perform your Energy Assessment.



Kentucky Power EnergyAdvantage at Home Program Application Summary and Recommendations

Submit Date:

Application ID:

Customer Information	
Customer Name	Phone
Account #	Email
Address	

Details of your On-Site Home Energy Assessment				
Lighting				
ENERGY STAR®?	Watts	Quantity	Location	Working?
Notes				
ENERGY STAR®?	Watts	Quantity	Location	Working?
Notes				
ENERGY STAR®?	Watts	Quantity	Location	Working?
Notes				

Heating Equipment					
Location	Heating Type	Age	Fuel Source	Heating Capacity	AFUE
Quantity	Functional?	% of Heat Load			

Notes

Cooling Equipment

Location	Cooling Type	Age	Fuel Source	Cooling Capacity
----------	--------------	-----	-------------	------------------

SEER	EER	Quantity	Functional?	% of Cooling Load
------	-----	----------	-------------	-------------------

Notes

Thermostats

Thermostat Type

Notes

Duct Sealing

% In Conditioned Space	Ductwork Condition
------------------------	--------------------

Cooling Equipment Type	Cooling Capacity (Btu)	SEER
------------------------	------------------------	------

Heating Equipment Type	Heating Capacity (Btu)	HSPF
------------------------	------------------------	------

Notes

Insulation

Location	Area	Condition	Existing R Value	Recommended R Value
----------	------	-----------	------------------	---------------------

Notes

Air Sealing

# of Exterior Doors needing Weather-Stripping	# of Windows needing Weather-Stripping	# of Outlets needing Gaskets
---	--	------------------------------

Notes

Domestic Hot Water General Information

Number of Kitchen Sinks	Number of Showers	Hot Water Pipes are Insulated	DHW Tank is Trapped or Insulated
-------------------------	-------------------	-------------------------------	----------------------------------

Domestic Hot Water Heater

Location	System Type	Fuel Source	Energy Factor	Temperature Setting
----------	-------------	-------------	---------------	---------------------

Notes

Appliances

Appliance Type	ENERGY STAR®?	Location	Age	Working?	Fuel Source
----------------	---------------	----------	-----	----------	-------------

Notes

Appliance Type	ENERGY STAR®?	Location	Age	Working?	Fuel Source
----------------	---------------	----------	-----	----------	-------------

Notes

Measures Directly Installed During your Home Energy Assessment

Category	Name	Estimated Gross kWh Savings	Quantity
----------	------	-----------------------------	----------

Recommended Measures Identified During your Home Energy Assessment

Category	Name
----------	------

Home Energy Health & Safety Assessment Observations

Ventilation Conditions Observed?

- | | | | |
|--|--|-------------------|--|
| 1. High Ambient CO Level | | 4. Unvented Dryer | |
| 2. Potential Explosive Condition May Develop, identify below | | 5. Gas Leak | |
| 3. Unvented Space Heater (e.g., Propane, Kerosene) | | | |

If Gas Leak, provide date, time, and reference number in comment section below

Home Energy Health & Safety Assessment Observations

Additional Comments

Moisture Conditions Observed?

1. Inadequate Ventilation
2. Incorrect Venting
3. Mold/Mildew Present
4. Conditions exist for Mold or Mildew to Develop

5. Standing Water
6. Condensation
7. Rot

Additional Comments

Other Health and Safety Conditions Observed?

1. Indoor Air Quality (IAQ)
2. Structural
3. Sewer
4. Asbestos

5. Vermiculite Insulation (may contain asbestos)
6. Electrical
7. Infestation

Additional Comments

Recommendations for Your Home

Health & Safety-Related Suggested Actions

Clean/Repair Furnace/Boiler Vent and/or Chimney
 Clean/Repair Water Heater Vent and/or Chimney
 Have Furnace/Boiler Serviced to Reduce Co Levels
 Have Hot Water Heater Serviced to Reduce Co Levels

Clean Oven/Stove
 Remove Unvented Heater
 Have Flooding in Basement Corrected
 Present these Findings to Landlord for Any Issue Corrections

Additional Comments

Other Actions you can take in your Home to Save Energy and Reduce Energy Costs

- ✓
- ✓
- ✓
- ✓
- ✓

Home Energy Health & Safety Assessment Observations

✓
✓
✓
✓
✓

Websites and Programs to check out for Additional Ways to Save Energy in Your Home

Lighting

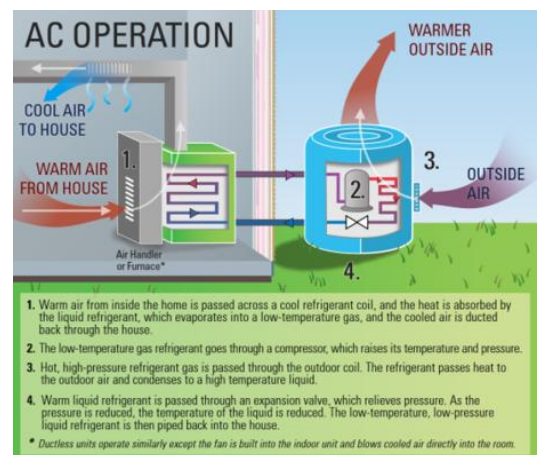
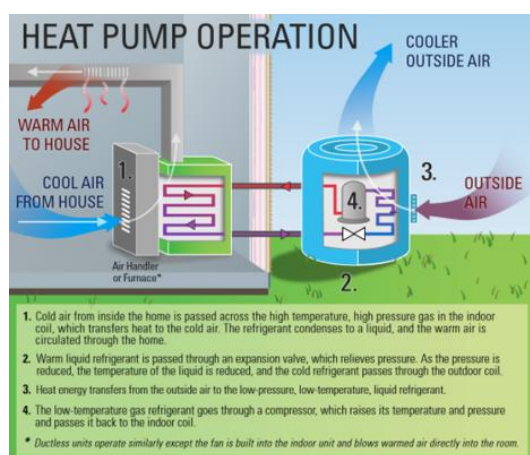
Lighting products that have earned the U.S. Department of Energy's ENERGY STAR® deliver exceptional features while using less energy. Saving energy helps you save money on utility bills and protect the environment by reducing greenhouse gas emissions in the fight against climate change. ENERGY STAR certified light bulbs:

- Use up to 90% less energy than standard bulbs.
- Last at least 15 times longer and saves about \$55 in electricity costs over its lifetime.
- Meet strict quality and efficiency standards that are tested by accredited labs and certified by a third party.
- Produce about 70-90% less heat, so it is safer to operate and can cut energy costs associated with home cooling.

For more information on energy efficient lighting products, visit the [ENERGY STAR website \(www.energystar.gov\)](http://www.energystar.gov).

Heating and Cooling Equipment

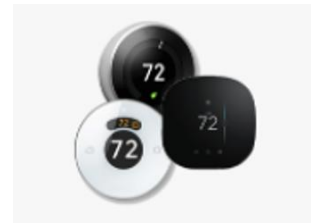
Nearly half of the energy used in your home goes to heating and cooling. Making smart decisions about your home's heating, ventilating, and air conditioning (HVAC) system can have a big effect on your utility bills - and your comfort. If your HVAC equipment is more than 10 years old or is not keeping your house comfortable, have it evaluated by a professional HVAC contractor. If it is not performing efficiently or needs upgrading, consider replacing it with a unit that has earned the ENERGY STAR. Depending on where you live, replacing your old heating and cooling equipment with ENERGY STAR certified equipment can cut your annual energy bill by nearly \$140. But before you invest in a new HVAC system, make sure that you have addressed the big air leaks in your house and the duct system. Sometimes, these are the real sources of problems rather than your HVAC equipment.



Kentucky Power's EnergyAdvantage at Home Program offers **rebates** for Ductless Mini-Split Heat Pumps. For more information on Heat Pump technology and available rebates, visit the Kentucky Power [website \(https://www.kentuckypower.com/savings/home/energy/\)](https://www.kentuckypower.com/savings/home/energy/), or the ENERGY STAR website (www.energystar.gov), or contact us at 1- 844-657-1230, EnergyAdvantageKentucky@trccompanies.com.

Thermostats and Controls

A smart thermostat lets you control your home's heating and cooling temperature settings from your "smart" device - phone, tablet, or personal computer. Smart thermostats are Wi-Fi enabled, allowing access to its temperature and other features through an app downloaded on your smart device. An ENERGY STAR certified smart thermostat offers more convenience, energy savings, insight, and control than manual or programmable thermostats. Homes with high heating and cooling bills, as well as homes that are unoccupied for much of the day, can save approximately \$100 a year with an ENERGY STAR certified smart thermostat.



Choose an ENERGY STAR certified smart thermostat for your home to reduce your energy bills, enhance your comfort and control indoor temperatures based on your preferences and lifestyle. The Kentucky Power EnergyAdvantage at Home Program offers a \$50 rebate for smart thermostats installed at homes with electric HVAC and installed by a qualifying Trade Ally.

Insulation and Air Sealing

Insulation is your primary defense against losing heating or cooling through your home's thermal envelope (i.e., walls, roofs, and foundation). It is always the priority in terms of practical cost-effective improvements to a home. The effectiveness of insulation is based on its "R-Value," the standard measure of thermal resistance. A higher R-Value results in slower heat loss/gain, lower energy bills, and a more comfortable home. Installing the correct amount of insulation is key to reducing heating and cooling costs.

Air sealing is the next defense against heat loss/gain through the leaks in the envelope of the home. A home that is both tight and well-ventilated provides the best comfort and energy efficiency. Air sealing improvements can greatly benefit a home, and a ventilation strategy will keep the home and its occupants healthy and safe.

Sealing air leaks around your home and adding insulation can help your home be more comfortable and energy efficient and provide up to 10% savings on your annual energy bills. Simple fixes include installing weather stripping on doors and caulking around windows, while bigger jobs might include sealing leaks and adding insulation in your attic.

Kentucky Power's EnergyAdvantage at Home Program offers **rebates** on attic and floor insulation. For more information, visit the program website (<https://www.kentuckypower.com/savings/home/energy/>), or contact us at 1- 844-657-1230 or EnergyAdvantageKentucky@trccompanies.com.

Domestic Hot Water

Electric Water Heaters - Using a standard electric water heater can cost a four-person family more than \$600 per year. Heating water typically accounts for about 15% of a home's energy use - high efficiency units can use 10 to 25% less energy than standard models, though your energy savings from installing high efficiency ENERGY STAR systems will depend on several factors, including family size, system location, and appliances. You can make some simple changes to reduce the energy consumed by your water heater by reducing the thermostat setting to 120-125°F.

Low Flow Showerheads - Did you know that standard showerheads use 2.5 gallons of water per minute (gpm)? Water-saving showerheads that earn the WaterSense (www.epa.gov/watersense) label must demonstrate that they use no more than 2.0 gpm. This label also ensures that the products provide a satisfactory shower that is equal to or better than conventional showerheads on the market. EPA worked with a variety of stakeholders - including consumers who tested various showerheads - to develop criteria for water coverage and spray intensity. All products bearing the WaterSense label - including water-efficient showerheads - must be independently certified to ensure they meet EPA water efficiency and performance criteria. The average family could save up to 2,700 gallons per year by installing WaterSense labeled showerheads. Since these water savings will reduce demands on water heaters, they will also save energy. In fact, the average family could save more than 330 kilowatt hours of electricity annually, enough to power a house for 11 days.

Faucet Aerators - Replacing old, inefficient faucets and aerators with WaterSense labeled models can save the average family up to 700 gallons of water per year, equal to the amount of water needed to take 45 showers. Also, since these water savings reduce demands on water heaters, households will also save enough energy to run a

hairdryer 17 minutes a day for a year. Achieving these savings can be as easy as twisting on a WaterSense labeled aerator, which can cost as little as a few dollars.

Appliances

Every appliance comes with two price tags: the purchase price and the cost of operating the product. ENERGY STAR certified appliances help consumers save money on operating costs by reducing energy use without sacrificing performance:

Reduced Energy Costs — According to the U.S. Department of Energy, ENERGY STAR appliances can reduce your home appliance energy usage, and costs, by as much as 10 percent to 50 percent. While specific savings vary home to home, the National Resource Defense Council (NRDC) estimates that energy efficiency standards have already saved American homeowners about \$200 billion to date, or about \$2,000 per household.

Environmentally Friendly — ENERGY STAR appliances aren't simply good for your pocketbook. According to sources as varied as the Washington Post, the NRDC, and the U.S. Government, they reduce greenhouse gas emissions, water consumption, and our reliance on dwindling fossil fuel resources and foreign oil.

Convenience — ENERGY STAR appliances are also more convenient. For example, according to information provided by the NRDC and the Washington Post, purchasing ENERGY STAR washer and dryer means that you can wash more clothes in a single load, and dry them faster. In other words, you will do less loads of laundry and in less time, if you shop with ENERGY STAR labels in mind.

Information about the Approved Contractor who Completed your Home Assessment

Company Name

Contact

Title

Address

Email

Primary Phone

Kentucky Power Company
KPSC Case No. 2025-00365
Joint Intervenors' Post-Hearing Set of Data Requests
Dated July 6, 2026

DATA REQUEST

JI PHDR_3 Please refer to the hearing testimony of Stevi Cobern at HVT 10:00:30 to 10:01:20 a.m., and provide a copy of the referenced DOE guidelines regarding Savings-to-Investment Ratio.

RESPONSE

The DOE Savings-to- Investment Ratio (“SIR”) requirement is that energy conservation measures must have an SIR of 1.0 or greater to be installed using DOE weatherization funds. The SIR is calculated using the approved DOE energy audit software and compares the lifetime energy savings of a measure to its installed cost.

The primary DOE guidance on the Savings-to-Investment Ratio (SIR) requirement is found in:

- 10 CFR 440.21 – Weatherization Materials Standards and Energy Audit Procedures
- Weatherization Program Notice (WPN) 23-6 – Revised Energy Audit Procedures

Please see KPCO_R_JI_PHDR_3_Attachment1.

Witness: Stevi N. Cobern

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ATTACHMENT 1

ENERGY AUDIT TOOL SUBMITTAL REQUIREMENTS

BASIC OUTLINE FOR EXPEDITED AUDIT SUBMISSION

Grantees must submit the following documentation for all Expedited audits listed in [Attachment 3](#). Standard audit submittals include these items and the additional items outlined in Section IV.

1. A formal request (e.g., email, letter) to DOE for approval of the specific audit tool for use in the WAP program including the dwelling type it will be used for.
2. A list of all measures considered by the audit for installation as Energy Conservation Measures (ECMs) including:
 - a. Lifetimes used to analyze the cost-effectiveness of each installed measure
 - b. Discount rate used in future savings estimates
 - c. Statement of compliance with [10-CFR 440 Appendix A](#)
 - d. Any Special Materials Requests as outlined in [Attachment 6](#)
3. Any Special Audit Procedure requests (e.g., Grantee administered fuel-switching, solar photovoltaics (solar PV), etc.)
4. Fuel cost for all fuel types considered by the energy audit including Grantee's procedure for updating fuel costs.
5. A list of General Heat Waste (GHW) measures (if any).
6. Energy Audit Policies and Procedures, including:
 - a. Field operations manual
 - b. Field data collection forms
 - c. Combustion safety protocols
 - d. Ventilation calculator
 - e. Health and safety plan
 - f. Energy audit software user's manual
 - g. Technical standards for energy auditors

DETAILED DESCRIPTION OF SUBMITTAL REQUIREMENTS

The following requirements from [10 CFR 440.21](#) apply to ALL submittals for energy audit tool approval or reapproval. For audit tools listed in [Attachment 3: Expedited Energy Audit For WAP](#), no other requirements apply. For all other energy audit tool submissions, additional requirements are found in section VI (Analytic Method) below.

I. Modeling Software Analysis

- A. *Measures Considered:* Pursuant to [10 CFR 440.21\(d\)](#), provide a complete list of the weatherization measures typically enabled for evaluation by the energy audit tool which includes the expected lifetime used in the savings to investment ratio (SIR) calculation of each measure. Provide an explanation of how WAP funded Incidental Repair Measures (IRM), GHWs, and H&S Measures will be categorized, recorded, and entered in the energy audit software and the work order.

- B. *Fuel Costs*: Pursuant to [10 CFR 440.21\(d\)](#), provide the base fuel costs used for evaluation of measures by the energy audit tool and cost modifiers as allowed by DOE guidance (e.g., Social Cost of Carbon).
- C. *Discount Rate*: Pursuant to [10 CFR 440.21\(d\)](#), provide the discount rate percentage used in the future cost-savings estimates used by the energy audit tool, including fuel price indices utilized.

II. Field Procedures

- A. *Field Procedures and Protocols*: Pursuant to [10 CFR 440.21\(f\)4](#), provide field assessment policies and procedures (e.g., field operations manual, field data collection forms, technical standards) used for data collection. Procedures are required for each building type the energy audit tool will serve. The following criteria is used to determine compliance:
1. Do field assessment policy and procedures require sufficient field data collection to accurately model dwelling units?
 - All required energy audit tool data entries are visually and/or diagnostically field verified and documented?
 - Building diagnostics address all measures considered by the energy audit?
 - Combustion safety testing procedures cover all combustion appliances?
 2. How do energy auditor assessments affect the auditor's actions and recommendations?
 - Is policy and procedure provided to correctly identify the thermal and pressure boundary of the dwelling unit?
 - Is policy and procedure provided to ensure consistent measure selection including target values (e.g., infiltration and duct sealing targets, insulation R-value targets, etc.)?
 3. What advanced diagnostic and assessment techniques are routinely used by the energy auditor and/or crew?
 - Is policy and procedure provided to ensure accurate building diagnostics are performed for every dwelling unit?
 - Are combustion safety testing procedures complete?
 4. Are energy audit policy and procedures tailored for the building type being served?

III. Energy Modeling Procedures

- A. *Modeling Procedures*: Pursuant to [10 CFR 440.21\(f\)6](#), provide a detailed description of the energy modeling policy and procedure (e.g., Grantee-specific energy audit tool user's manual) which details how energy auditors are to complete all aspects of data entry to satisfy both Grantee and DOE requirements.
- B. *Documentation for Non-Energy Conservation Measures*: Pursuant to [10 CFR 440.21\(d\)](#), explain how DOE funded IRMs, GHG and H&S measures are to be entered into the energy audit tool. For any of these categories, if entry into the energy audit is not required, describe how and where these measures will be documented. For IRMs not entered in the audit, explain how compliance with [10 CFR 440.21\(d\)](#) is ensured.
- C. *Building Model True-up with Actual Energy Bills*: Pursuant to [10 CFR 440.21\(f\)2](#), provide policy and procedures for trueing up multifamily buildings through actual dwelling unit energy bills. For all other dwelling types, DOE encourages Grantees to utilize energy modeling true-up using site-specific utility bills but does not require it.

IV. Work Orders & Materials

- A. *Energy Audit Based Work Scope Development*: Pursuant to [10 CFR 440.21\(f\)6](#) and [WPN 22-4](#), provide policy and procedures for work order requirements which demonstrate energy audit results are accurately integrated into a complete scope of work including:
1. Detailed performance and installation requirements/objectives to be included in crew/contractor work orders from the completed energy audit, including R-values, U-values, installed equipment efficiencies, infiltration and duct sealing targets, Grantee's DOE approved Field Guides and/or SWS, etc.
 2. List of all measures performed, the funding category (e.g., ECM, IRM, H&S, GHW etc.) for each, and the funding source for each (i.e., DOE WAP, LIHEAP, etc.).
- B. *Weatherization Materials Installed*: Pursuant to [10 CFR 440.21\(b\)](#), provide a formal statement for each major building type (e.g., site-built single family, manufactured housing, multifamily) that acknowledges only weatherization materials that meet or exceed the standards listed in [10 CFR 440 - Appendix A](#) will be installed in eligible dwelling units.
1. On a Grantee-by-Grantee basis DOE may approve additional non-Appendix A weatherization materials determined appropriate for WAP. The requirements to gain such approval(s) are set forth in [Attachment 6 \(Special Approval of Energy Conservation Materials\)](#).
 2. This statement must include a list of any weatherization materials not in Appendix A that have been approved for Grantee use per [10 CFR 440.21\(b\)](#). This list should only contain materials installed as ECMs. Ancillary materials, IRM materials as defined in [WPN 19-5](#), as well as H&S materials, are not defined as weatherization materials, therefore are not required to be listed.
- C. *GHW Reduction Lists*: Pursuant to [10 CFR 440.21\(h\)](#), provide a complete list of the GHW reduction measures that the Grantee allows to be installed in eligible dwellings. DOE has determined these weatherization materials to be cost-effective, and do not require justification by a site-specific energy audit. GHW reduction materials are intended to be low-cost items that are quickly and easily installed. Total GHW measure costs (including labor) must not exceed \$250. Grantees must provide procedures guiding the installation of GHW materials. DOE has approved, the following measures as GHW:
1. Water heater tank wrap (i.e., insulating blanket).
 2. Water heater pipe insulation (on first six feet of hot water pipe exiting water heater).
 3. Faucet aerators.
 4. Low flow showerheads.
 5. Limited weather stripping and caulking to increase comfort (does not include major air sealing work, which should be guided by blower door testing); and
 6. Furnace or air conditioner filters.

Grantees may request approval to install GHW materials not listed above by providing documentation of their cost-effectiveness from a representative number of site-specific energy audits or sample energy calculations. DOE may also accept reputable analytic reports or published articles that are generally accepted by the weatherization community to document the cost-effectiveness of potential GHW materials. A GHW material approval request may be submitted at any time; however, this request may not be included in the State Plan, or Annual Application submittal. Previously approved Grantee specific GHW

materials must be included in the GHW Reduction List submitted with the Energy Audit Approval request each 5-year cycle.

V. Administrative Requirements

- A. *Health and Safety*: Pursuant to [10 CFR 440.21\(f\)5](#), provide a description of how the approved H&S plan is implemented in the field (e.g., field operations manual, field guide, technical standards, installation standards, installation guidelines). Each major dwelling type must be addressed as applicable.
- B. *Energy Audit Procedures Required for Each Building Type Served*: Pursuant to [10 CFR 440.21\(f\)\(7\)](#), Grantees shall use DOE-approved energy audit procedures that are specific to each major dwelling type representing a significant portion of the Grantee's weatherization program (i.e. site-built single-family, manufactured housing, low-rise multifamily, and large multifamily). This requirement acknowledges the varying energy audit requirements of different dwelling types. DOE requires energy audit procedures to be approved specifically for use on single-family dwellings and manufactured housing at a minimum for all Grantees (except for the limited instances where manufactured housing is rare or prohibited).
 - 1. For energy audit purposes, DOE considers multifamily buildings to be those containing five dwelling units or more (see clarifying definitions in WPN 23-04). Multiple single-family energy audits can be used in buildings with one to four dwelling units, or in vertically connected dwellings such as row homes or townhomes regardless of total number connected. Some single-family energy audits may qualify for use in low-rise multifamily dwellings, however, single family approval of a tool by itself does *not* constitute approval to use this tool in low-rise multifamily buildings. Grantees must undergo the same approval process for multifamily dwellings per this Attachment.
- C. *Annual Review of Measure and Energy Costs*: Pursuant to [2 CFR 200](#), provide policies and procedures regarding the methods and frequency of measure and fuel cost updates. This update does not require the audit or priority list(s) to be re-approved more often than every five years. However, changes in measure costs or fuel prices affect the selection and order of measures.
- D. *Software Maintenance*: Pursuant to [10 CFR 440.21\(i\)](#), if a Grantee adopts an updated version of its DOE-approved energy audit software, the Grantee must submit to DOE the name and version of the updated software, and must provide at minimum:
 - 1. Summary of the changes in the updated version, and
 - 2. Sufficient details to determine the engineering soundness of the revision[s]. DOE may contact the software developer to determine what changes have been made. If the energy estimating methods remain essentially unchanged (or have been improved) and the software still complies with program regulations, DOE will approve its use.

STANDARD ENERGY AUDITS: ADDITIONAL SUBMITTAL REQUIREMENTS

Any request for DOE approval of an audit tool not listed in [Attachment 3](#) is classified as a Standard request. The request must include the following additional information:

VI. Analytic Methods

A. *Energy Estimating Methodology*: Pursuant to [10 CFR 440.21\(f\)](#), describe the methods used by the energy audit software to estimate annual energy use of the dwelling unit and the potential energy savings. The description must provide enough detail to determine the engineering soundness of the technical approach. The Grantee may provide this description narratively or reference the appropriate sections of a users' manual for the energy audit software or other technical support documents. Whether described narratively or referenced from another document, the Grantee's submittal must answer the following questions:

1. What energy estimating method is used (e.g., modified degree-day, variable base degree day, ASHRAE bin, ASHRAE modified bin).
2. What format of climatic data is used (e.g., degree-day, bin, or hourly data)? If degree-day weather data is used, what base temperature is used and why? Which weather data sites are used by different Subgrantees?
3. Are existing energy use and energy requirements of the dwelling unit determined from actual energy bills, by generally accepted engineering calculations, or both?
4. Does the energy audit address all significant heating and cooling needs?
5. How are conductive, convective, and radiative heat losses (or gains) estimated?
6. How does the energy estimating method treat sensible and latent heat gains from internal sources?
7. How is the energy consumption of heating and cooling equipment estimated (e.g., steady-state efficiency, part-load curve) during the audit for pre- and post-weatherization?
8. How are blower door readings and the results of other tests (e.g., duct leakage) used by the energy estimating method?
9. How does the energy audit software address domestic hot water and/or household appliance measures?
10. Are estimated fuel/energy cost savings discounted to net present value?
11. For multifamily audits, what internal verification feature, such as trueing-up the model with actual energy consumption, does the audit use to validate each audit, or how does the Grantee otherwise ensure that the building is properly modeled?

B. *Measure Interaction*: Pursuant to [10 CFR 440.21\(e\)1](#), provide the following information to satisfy this requirement:

1. Describe how the energy audit tool accounts for the interaction between architectural (e.g., insulation, air sealing) and mechanical (e.g., furnace replacement, programmable thermostat) measures.
2. Provide audit results of a sample dwelling unit to document that, when moving from an architectural to a mechanical measure (or vice versa), the energy audit tool adjusts the estimated fuel cost savings of measures with lower, non-interacted SIRs. The sample audit results must show the interacted and non-interacted energy savings and SIR for at least one architectural measure and one mechanical measure. Provide a statement that the energy audit procedures will eliminate from consideration for DOE-funded installation any measure that has an interaction-adjusted SIR of less than one.

C. *Cost-effectiveness Requirements*: Pursuant to [10 CFR 440.21\(d\)](#), provide the following information to satisfy this requirement:

1. Describe how SIRs are calculated for all individual weatherization measures and for the overall package of measures installed in a dwelling unit. This must include details of how fuel/energy cost savings are discounted to net present value.
2. Describe how energy conservation measures will be assigned priority in descending order of their cost-effectiveness and how those that are not cost-effective (other than air sealing) will be eliminated from the audit DOE-funded recommended measures.
3. Explain how the cost of air sealing, as an energy saving measure, is included in the SIR for the package of weatherization measures. Air sealing is the exclusive energy conservation measure that is not required to show a post-weatherization individual SIR of 1.0 or greater. The package of weatherization measures, including costs and projected savings for air sealing, must have a post-weatherization SIR of 1.0 or greater.
4. Include a description of how user-defined measures will be allowed, including who will be allowed to develop measures, the procedures for development, and how Grantee will monitor the cost-effective use of user-defined weatherization measures.
5. Describe how all incidental repair costs are included in the cost of the overall package of weatherization measures and the overall SIR (See [WPN 19-5, Weatherization Assistance Program Incidental Repair Measure Guidance](#) for more details).

ATTACHMENT 2

PRIORITY LIST SUBMITTAL REQUIREMENTS

OVERVIEW

DOE is responsible for ensuring that only cost-effective weatherization measures are installed with DOE funds. Each Grantee must use advanced energy audit procedures to ensure cost-effectiveness of the WAP and treat each weatherized building as a whole system.

Priority List (PL) requirements for the WAP are described in the regulations governing the Program ([10 CFR 440.21\(g\)](#)). Priority List(s) are secondary to a Grantee's Energy Audit Submittal. Priority Lists cannot be approved until a Grantee has an approved energy audit for the specific housing type. See *Attachment 1* for Energy Audit Submittal Requirements.

PRIORITY LIST DEVELOPMENT CONSIDERATIONS

Subset of Similar Homes: Grantees that want to use a Priority List must review eligible housing stock to determine which building characteristics dictate the selection and order of recommended weatherization measures. For example, upon evaluation, a Grantee may find that the list of recommended measures for a typical one-story ranch is different than the list for a three-story Victorian house.

The number of sample audits required to support the proposed Priority Lists depends on how clearly the Grantee defines the set of similar dwelling units for the Priority List(s). For example, if the Grantee intends to use one Priority List for all site-built single-family dwellings when there is significant variation in housing stock, climatic conditions, fuel choices, heating/cooling equipment choices, or measure costs; then a substantial number of sample audits are required to ensure measures are properly ranked.

Measures in each sample audit must be prioritized from the highest to lowest savings to investment ratio (SIR), and the overall (cumulative) SIR must be at least 1.0.

Circumstances where the priority list does not apply and when a site-specific audit is required:

1. If an auditor determines a measure should be considered for a dwelling, and that measure is not on the approved Priority List for that building type.
2. If an auditor determines the incidental repair measures (IRM) have a cost greater than the current limit for the Priority List.
3. Anytime fuel-switching is considered (see [Attachment 5](#)).

Incidental Repair Costs: A cost limit for incidental repairs ([WPN 19-5](#)) must be established for each Priority List. This cost limit must be included during Priority List development and must be consistent with the total job cost, including all incidental repairs, having an SIR of at least 1.0. The sample audits required to support the proposed Priority List(s) must include costs for typical anticipated IRM to justify a maximum per unit cost of IRM for each Priority List.

DESCRIPTION OF SUBMITTAL REQUIREMENTS

At a minimum, any Grantee Priority List submittal must address these items:

- Describe how each Priority List was developed.
- Identify the housing characteristics of the dwellings that each list applies to.
- Describe how the subset of similar homes was determined.
- Define the circumstances that will require site-specific audits rather than the use of the Priority List.

To accomplish this, provide all input data, assumptions, and audit results (recommended measures) for dwelling units, which must include:

1. Description of the home type that the Priority List applies to, (e.g., site-built, 1- and 2-story, natural gas heated, centrally air-conditioned homes with basements that have between 1,000 and 2,500 square feet of conditioned space).
2. Complete list of the weatherization measures typically “enabled” for evaluation by the energy audit tool that was used to produce the Priority List, material and labor costs for each measure, and the expected lifetime of each measure used in the SIR calculation.
3. Fuel prices used in developing the Priority List including an evaluation of historical fuel prices to determine the minimum fuel price that should be used to ensure weatherization measures are always cost-effective.
4. Description of the circumstances in which fuel and/or materials price changes invalidate the submitted Priority List.
5. Complete printouts of the data entry into the energy audit tool.
6. Recommended measures report from the audit tool showing the entire measure cost, first-year savings, SIR for each measure, total job cost and overall (cumulative) SIR.
7. Total incidental repair cost limit that triggers a site-specific audit.

ATTACHMENT 3 EXPEDITED ENERGY AUDITS FOR WAP

To be on the expedited energy audit list, a software tool must be independent third-party verified for energy modeling accuracy and is currently approved for usage on DOE WAP projects.

	Single Family (1-4 units)	Manufactured Housing	Low-Rise Multifamily (5+units, 3 stories or less, No central mechanical systems)	Large Multifamily (25+ units/building of 4 stories or more, or 5+ units/building with central mechanical systems)
OptiMiser	Developer: OptiMiser LLC, Denver, CO			
	YES	YES	NO	NO
REM	Developer: NORESCO, LLC, Boulder, CO			
	YES	YES	YES	YES
TREAT	Developer: Performance Systems Development (PSD), Ithaca, NY			
	YES	YES	YES	YES
Weatherization Assistant (NEAT, MHEA, MulTEA)	Developer: Oak Ridge National Laboratory (ORNL), Oak Ridge, TN			
	NEAT approved	MHEA approved	NEAT and MulTEA approved only for buildings with individually heated and cooled dwelling units	MulTEA approved only for buildings with individually heated and cooled dwelling units
“YES” means that the audit tool has been previously approved for this housing type “NO” means that the audit tool has not been previously approved for this housing type or that it is not designed for this housing type				

ATTACHMENT 4

SOLAR PHOTOVOLTAIC (PV) IMPLEMENTATION

OVERVIEW

This attachment serves to:

- Inform Grantees of existing regulations related to the integration of renewable technologies.
- Outline the DOE approval process for including solar PV within the WAP.
- Identify resources that will assist Grantees in the approval process.

Grantees must work with their DOE Project Officer (PO) to ensure that all materials required for approval and implementation of solar PV technologies with WAP funding are complete. Based on initial documentation provided to DOE, additional information may be requested from the Grantee.

SOLAR PV TECHNOLOGY APPROVAL

To integrate solar PV or other renewable technologies into the WAP, Grantees must follow the standard path for non-Appendix A technology approval as described in [Attachment 6](#) of this guidance. This includes demonstrating that the technology *can* achieve a Savings to Investment Ratio (SIR) of 1.0 or greater in the Grantee service area, inclusion of the technology in the Grantee's Annual Plan, and a demonstration that the Grantee can integrate the technology into its energy audit protocol for the specific housing type such that a project-level analysis of the technology can generate an accurate SIR calculation.

NEPA APPROVAL

Per the National Environmental Policy Act (NEPA) of January 1, 1970, federal agencies must assess the environmental effects of their proposed actions prior to making decisions. However, NEPA has granted a Categorical Exemption for WAP PV installations: When the PV system size is 60kW or less and the PV panels are mounted on the roof or otherwise attached to the dwelling, the system qualifies for a Categorical Exception and additional NEPA review and approval is not required. Any other PV installation in WAP requires a NEPA impact assessment, which can be coordinated with the DOE PO.

APPROVAL PROCESS

A request to approve solar PV can be made at any time. The Grantee should provide the following items to their PO as part of the official request:

- A written request to include solar PV as an approved measure in the Grantee's program and which housing types will be considered.
- A completed Special Materials Request (Attachment 6), including maximum PV system size and installation location (i.e., roof mounted, ground mounted, or other).
- Grantee written policies applicable to solar PV energy modeling, installation, inspections, and monitoring, including:
 - A description of the process for including leveraged funds in the SIR calculation.
 - Meeting compliance with Historic Preservation requirements.
 - Requirements for Grantee, Subgrantee, and/or contractor training, qualifications, or certification.
- A sample analysis that includes solar PV as a measure in the energy modeling and cost-effectiveness calculations.
 - The analysis must be based on accurate inputs for your service territory, including applicable utility net metering rates and/or renewable energy credit (REC) rates, and measure lifespans (refer to Attachment 9 for DOE maximum lifespan).
 - The DOE Solar SIR tool can be used for this analysis (see the "Resources" section below).

- A declaration that the proposed solar PV system type or types are eligible for the NEPA categorical exclusion; OR a written process for NEPA impact assessment for solar PV installation if it is not eligible for the Categorical Exemption as described above.

It is important for Grantees to have a thorough understanding of these issues before implementing Solar PV. If a Grantee currently lacks the technical expertise to address these points accurately, it is imperative that this expertise is acquired via training or the assistance of an outside consultant before submitting a request to DOE. However, no amount of technical assistance by DOE can substitute for technical knowledge at the Grantee level.

Any questions regarding these items should be directed to the Grantee's PO. Once written approval is granted via a revised energy audit approval memo, the Grantee may begin implementation of Solar PV.

RESOURCES:

- **Solar PV SIR Calculator** WAP has worked with the DOE Solar Energy Technologies Office to develop an online Solar PV SIR calculator that will allow Grantees to produce a defensible analysis of the potential cost effectiveness of solar PV within their territory. Links to the analysis tool and a blog posting providing more details are below:
 - <https://www.energy.gov/eere/slsc/downloads/savings-investment-ratio-calculator-renewables>
 - <https://www.energy.gov/eere/articles/new-analysis-shows-national-potential-solar-power-low-income-communities>

ATTACHMENT 5

FUEL-SWITCHING SUBMITTAL REQUIREMENTS

OVERVIEW

Pursuant to [10 CFR 440.21\(b\)](#), DOE “may approve an unlisted material upon application from any State.” With prior DOE approval, fuel-switching is allowed when cost-effective or when justified for H&S reasons as required by [10 CFR 440.21\(d\)](#). DOE approval for fuel switching can be achieved in two ways, either on a case-by-case basis or as a policy administered by the Grantee.

CASE-BY-CASE FUEL SWITCHING APPROVAL

For case-by-case fuel-switching approval, the Grantee must submit the following to its Project Officer (PO) for DOE approval:

1. A description of the proposed fuel-switch as an ECM and/or H&S and the reason for doing so.
2. A complete site-specific energy audit with all supporting documentation that either:
 - a. Demonstrates fuel-switching is cost-effective when interacted with all other appropriate energy conservation measures for the building, or
 - b. Properly supports the proposed switch as a H&S measure.
3. Supporting documentation must include the initial site assessment, all available photos, proposed equipment details (type, capacity, efficiency, etc.), the entire cost of the installation including ancillary equipment necessary for the fuel-switch (e.g., new natural gas lines and additional or upgraded electrical equipment), fuel costs used in the energy audit, the energy audit’s input record (all costs must be modeled in the ECM evaluation), and selected measures report.

GRANTEE ADMINISTERED FUEL SWITCHING APPROVAL

To assume responsibility for administering the fuel-switching policy, the Grantee must submit the following information to its PO.

1. A statement in the Energy Audit Procedures section of the Grantee’s Annual Plan that fuel-switching is allowable when the site-specific energy audit demonstrates the cost-effectiveness of the fuel switch over the life of the measure as indicated by the SIR.
2. A statement that if a heat pump or other combined heating-and-cooling system is to replace a heating-only (or cooling-only) system, no savings will be attributed to the previously non-existent cooling (or heating) system, but that all the costs of running the system throughout the year will be included in the audit.
3. The audit libraries that contain:
 - a. All utility cost information to provide accurate data for the fuel-switch analysis
 - b. The escalation rate of energy prices used in the energy audit over the life of the new measure
 - c. All related charges associated with fuel-switching (e.g., permits and new or improved utility connections)
4. Demonstration of Capability: In addition to accepting the administrative burden associated with making decisions about fuel-switching, the Grantee must also demonstrate ability to analyze the information provided by the Subgrantee when a request for fuel-switching is submitted. To demonstrate this internal capability to DOE, the Grantee must submit the following documents as part of their fuel-switching policy:
 - a. One complete sample audit for each type of fuel-switching scenario anticipated (e.g., one sample audit for switching from an oil furnace to a heat pump, one sample audit for switching from a gas furnace and central air conditioning combination to an electric heat

- pump, etc.) with all supporting documentation that demonstrates fuel-switching is cost-effective when interacted with all other appropriate energy conservation measures for the dwelling.
- b. Supporting documentation must include a copy of the client utility bill(s) which list all charges for the pre-weatherization energy source(s). Cost information must include but is not limited to; the costs charged for the current energy commodity, base and service charges, taxes, supply and transmission charges and renewable energy or energy conservation adjustments.
5. If the Grantee opts to implement an internal fuel-switching policy prior to the next energy audit procedures approval cycle, the above information associated with the Grantee fuel-switch policy must be submitted as supplemental information to their respective P.O

IMPORTANT: A site-specific computerized energy audit must be used to demonstrate the cost effectiveness of fuel-switching and ensure that the program requirement contained in [10 CFR 440.21\(d\)](#) is met to provide greater energy efficiency and reduction of energy costs for low-income clients.

ATTACHMENT 6

REQUEST FOR SPECIAL APPROVAL OF ENERGY CONSERVATION MATERIAL

Only the materials listed in Appendix A to CFR Part 440 are approved to use in the WAP. These materials and their specifications are listed in [Attachment 7](#). The Department of Energy (DOE) must approve other materials. To gain approval for other materials fill out the following form completely, attach any additional information required, and send the package to your PO for review.

1. Grantee Contact Information	
Grantee:	Click or tap here to enter text.
Grantee Representative:	Click or tap here to enter text.
Grantee Contact Email:	Click or tap here to enter text.

2. Material Request Information
Material requested for approval
Click or tap here to enter text.
List standard(s) that apply to material's selection. These may include ASTM, ANSI, UL, NFPA, etc. Optionally, you may attach a product cut sheet or spec sheet for review
Click or tap here to enter text.
☐ - Alternatively, I have attached information pertaining to standards.

3. Audit Justification
Any ECM that is to be installed with WAP funds must be cost-justified by the Grantee's computerized audit tool. To demonstrate this, Grantee must provide at least 2 audits that include the specific material listed in section 2 of this form. The submitted audits must contain the fuel costs, accurate material installation costs, lifespan of installation, and SIR of the installed material at a minimum. For some installations, other information may be required.
☐ - I have attached 2 audits with all requested information.

4. Priority Lists
Does Grantee use Priority List(s)? Yes ☐ No ☐
Will the material be included in any Priority List(s)? Yes ☐ No ☐
If you answered "Yes" to the second question, you must submit at least 5 computerized audits showing the materials position on each Priority List where this material is used by the Grantee. These audits must be representative of the housing stock that matches the Priority List previously approved by DOE for Grantee use. These audits must use the Grantee's currently approved audit tool. The submitted audit results must contain the fuel costs, accurate material installation costs, lifespan of installation, and SIR of the installed material at a minimum. For some installations, other information may be required.
☐ - I have attached 5 audits for each priority list per instructions.

ATTACHMENT 7 APPENDIX A TO PART 440 STANDARDS FOR WEATHERIZATION MATERIALS

[58 FR 12529, MAR. 4, 1993, AS AMENDED AT 69 FR 18803, APR. 9, 2004]

APPENDIX A TO PART 440—STANDARDS FOR WEATHERIZATION MATERIALS

The following Government standards are produced by the Consumer Product Safety Commission and are published in title 16, Code of Federal Regulations:

Thermal Insulating Materials for Building Elements Including Walls, Floors, Ceilings, Attics, and Roofs Insulation—organic fiber— conformance to Interim Safety Standard in 16 CFR part 1209;
Fire Safety Requirements for Thermal Insulating Materials According to Insulation Use—Attic Floor— insulation materials intended for exposed use in attic floors shall be capable of meeting the same flammability requirements given for cellulose insulation in 16 CFR part 1209;
Enclosed spaces—insulation materials intended for use within enclosed stud or joist spaces shall be capable of meeting the smoldering combustion requirements in 16 CFR part 1209.

The following standards which are not otherwise set forth in part 440 are incorporated by reference and made a part of part 440. The following standards have been approved for incorporation by reference by the Director of the Federal Register in accordance with 5 U.S.C. 552(a) and 1 CFR part 51. These materials are incorporated as they exist on April 5, 1993 and a notice of any change in these materials will be published in the FEDERAL REGISTER. The standards incorporated by reference are available for inspection at the National Archives and Records Administration (NARA). For information on the availability of this material at NARA, call 202-741-6030, or go to:
<http://www.archives.gov/federalregister/codoflregulations/ibrlocations.html>.

The standards incorporated by reference in part 440 can be obtained from the following sources:

Air Conditioning and Refrigeration Institute, 1501 Wilson Blvd., Arlington, VA 22209; (703) 524-8800.

American Gas Association, 1515 Wilson Blvd., Arlington, VA 22209; (703) 841-8400.

American National Standards Institute, Inc., 1430 Broadway, New York, NY 10018; (212) 642-4900.

American Society of Mechanical Engineers, United Engineering Center, 345 East 47th Street, New York, NY 10017; (212) 705-7800.

American Society for Testing and Materials, 1916 Race Street, Philadelphia, PA 19103; (215) 299-5400.

American Architectural Manufacturers Association, 1540 East Dundee Road, Palatine, IL 60067; (708) 202-1350.

Federal Specifications, General Services Administration, Specifications Section, Room 6654, 7th and D Streets, SW, Washington, DC 20407; (202) 708-5082.

Gas Appliance Manufacturers Association, (703) 525-9565.

National Electrical Manufacturers Association, 2101 L Street, NW, Suite 300, Washington, DC 20037; (202) 457-8400.

National Fire Protection Association, Batterymarch Park, P.O. Box 9101, Quincy, MA 02269; (617) 770–3000.

National Standards Association, 1200 Quince Orchard Blvd., Gaithersburg, MD 20878; (301) 590–2300.
(NSA is a local contact for materials from ASTM).

National Wood Window and Door Association, 1400 East Touhy Avenue, Des Plaines, IL 60018; (708) 299–5200.

Sheet Metal and Air Conditioning Contractors Association, P.O. Box 221230, Chantilly, VA 22022–1230; (703) 803–2980.

Steel Door Institute, 712 Lakewood Center North, 14600 Detroit Avenue, Cleveland, OH 44107; (216) 899–0100.

Steel Window Institute, 1230 Keith Building, Cleveland, OH 44115; (216) 241–7333.

Tubular Exchanger Manufacturers Association, 25 North Broadway, Tarrytown, NY 10591; (914) 332–0040.

Underwriters Laboratories, Inc., P.O. Box 75530, Chicago, IL 60675–5330; (708) 272–8800.

More information regarding the standards in this reference can be obtained from the following sources:
Environmental Protection Agency, 401 M Street, NW, Washington, DC 20006; (202) 554–1080.

National Institute of Standards and Technology, U.S. Department of Commerce, Gaithersburg, MD 20899, (301) 975–2000

Weatherization Assistance Programs Division, Conservation and Renewable Energy, Mail Stop 5G–023, Forrestal Bldg, 1000 Independence Ave, SW, Washington, DC 20585; (202) 586–2207.

**THERMAL INSULATING MATERIALS FOR BUILDING ELEMENTS
INCLUDING WALLS, FLOORS, ATTICS, AND ROOFS
(Standards for conformance)**

Insulation-mineral fiber:	
Blanket insulation.....	ASTM C665-98.
Roof insulation board.....	ASTM C726-00a.
Loose-fill insulation.....	ASTM C764-99.
Insulation-mineral cellular:	
Vermiculite loose-fill insulation.....	ASTM C516-80 (1990).
Perlite loose-fill insulation.....	ASTM C549-81 (1986).
Cellular glass insulation block.....	ASTM C552-88.
Perlite insulation board.....	ASTM C728-89a.
Insulation-organic fiber:	
Cellulosic fiber insulating board.....	ASTM C208-72 (1982).
Cellulose loose-fill insulation.....	ASTM C739-88.
Insulation-organic cellular:	
Preformed block-type polystyrene insulation.....	ASTM C578-87a.
Rigid preformed polyurethane insulation board.....	ASTM C591-85.
Polyurethane or polyisocyanurate insulation board faced with aluminum foil on both sides.....	FS HH-I-1972/1 (1981).
Polyurethane or polyisocyanurate insulation board faced with felt on both sides.....	FS HH-I-1972/2 (1981). And Amendment 1, October 3, 1985.
Insulation—composite boards:	
Mineral fiber and rigid cellular polyurethane composite roof insulation board.....	ASTM C726-88.
Perlite board and rigid cellular polyurethane composite roof insulation.....	ASTM C984-83.
Gypsum board and polyurethane or polyisocyanurate composite board.....	FS HH-I-1972/4 (1981).
Materials used as a patch to reduce infiltration through the building envelope.....	Commercially available.

**THERMAL INSULATING MATERIALS FOR PIPES, DUCTS,
AND EQUIPMENT SUCH AS BOILERS AND FURNACES
(Standards for conformance)**

Insulation—mineral fiber:	
Preformed pipe insulation.....	ASTM 1 C547-77.
Blanket and felt insulation (industrial type).....	ASTM C553-70 (1977).
Blanket insulation and blanket type pipe insulation (metal-mesh covered) (industrial type).....	ASTM C592-80.
Block and board insulation.....	ASTM C612-83.
Spray applied fibrous insulation for elevated temperature.....	ASTM C720-89.
High-temperature fiber blanket insulation.....	ASTM C892-89.
Duct work insulation.....	Selected and applied according to ASTM C971-82.
Insulation—mineral cellular:	
Diatomaceous earth block and pipe insulation.....	ASTM C517-71 (1979)
Calcium silicate block and pipe insulation.....	ASTM C533-85 (1990).
Cellular glass insulation.....	ASTM C552-88.
Expanded perlite block and pipe insulation.....	ASTM C610-85.
Insulation—Organic Cellular:	
Preformed flexible elastomeric cellular insulation in sheet and tubular form.....	ASTM C534-88.
Unfaced preformed rigid cellular polyurethane insulation.....	ASTM C591-85.
Insulation skirting.....	Commercially available.

FIRE SAFETY REQUIREMENTS FOR INSULATING MATERIALS ACCORDING TO INSULATION USE

Attic floor.....	Insulation materials intended for exposed use in attic floors shall be capable of meeting the same smoldering combustion requirements given for cellulose insulation in ASTM C739–88.
Enclosed space.....	Insulation materials intended for use within enclosed stud or joist spaces shall be capable of meeting the smoldering combustion requirements in ASTM C739–88.
Exposed interior walls and ceilings.....	Insulation materials, including those with combustible facings, which remain exposed and serve as wall or ceiling interior finish, shall have a flame spread classification not to exceed 150 (per ASTM E84–89a).
Exterior envelope walls and roofs.....	Exterior envelope walls and roofs containing thermal insulations shall meet applicable local government building code requirements for the complete wall or roof assembly.
Pipes, ducts, and equipment.....	Insulation materials intended for use on pipes, ducts and equipment shall be capable of meeting a flame spread classification not to exceed 150 (per ASTM E84–89a).

(Standards for conformance)

STORM WINDOWS

(Standards for conformance)

Storm windows:	
Aluminum insulating storm windows.....	ANSI/AAMA 1002.10–83.
Aluminum frame storm windows.....	ANSI/AAMA 1002.10–83.
Wood frame storm windows.....	ANSI/NWWDA I.S. 2–87. (Section 3)
Rigid vinyl frame storm windows.....	ASTM D4099–89.
Frameless plastic glazing storm.....	Required minimum thickness windows is 6 mil (.006 inches).
Movable insulation systems for windows.....	Commercially available.

STORM DOORS

(Standards for conformance)

Storm doors—Aluminum:	
Storm Doors.....	ANSI/AAMA 1102.7–89.
Sliding glass storm doors.....	ANSI/AAMA 1002.10–83.
Wood storm doors.....	ANSI/NWWDA I.S. 6–86.
Rigid vinyl storm doors.....	ASTM D3678–88.
Vestibules:	
Materials to construct vestibules.....	Commercially available.
Replacement windows:	
Aluminum frame windows.....	ANSI/AAMA 101–88.
Steel frame windows.....	Steel Window Institute recommended specifications for steel windows, 1990.
Wood frame windows.....	ANSI/NWWDA I.S. 2–87.
Rigid vinyl frame windows.....	ASTM D4099–89.

REPLACEMENT DOORS

(Standards for conformance)

Replacement doors—Hinged doors:	
Steel doors.....	ANSI/SDI 100–1985.
Wood doors:	
Flush doors.....	ANSI/NWWDA I.S. 1–87. (exterior door provisions)
Pine, fir, hemlock and spruce doors.....	ANSI/NWWDA I.S. 6–86.
Sliding patio doors:	
Aluminum doors.....	ANSI/AAMA 101–88.
Wood doors.....	NWWDA I.S. 3–83.

CAULKS AND SEALANTS

(Standards for conformance)

Caulks and sealants:	
Putty.....	FS TT-P-00791B, October 16, 1969 and Amendment 2, March 23, 1971.
Glazing compounds for metal sash.....	ASTM C669-75 (1989).
Oil and resin base caulks.....	ASTM C570-72 (1989).
Acrylic (solvent types) sealants.....	FS TT-S-00230C, February 2, 1970 and Amendment 2, October 9, 1970.
Butyl rubber sealants.....	FS TT-S-001657, October 8, 1970.
Chlorosulfonated polyethylene sealants.....	FS TT-S-00230C, February 2, 1970 and Amendment 2, October 9, 1970.
Latex sealing compounds.....	ASTM C834-76 (1986).
Elastomeric joint sealants (normally considered to include polysulfide, polyurethane, and silicone).....	ASTM C920-87.
Preformed gaskets and sealing materials.....	ASTM C509-84.

WEATHERSTRIPPING

(Standards for conformance)

Weatherstripping.....	Commercially available.
Vapor retarders.....	Selected according to the provisions cited in ASTM C755-85 (1990). Permeance not greater than 1 perm when determined according to the desiccant method described in ASTM E96-90.
Items to improve attic ventilation.....	Commercially available.
Clock thermostats.....	NEMA DC 3-1989.

HEAT EXCHANGERS

(Standards for conformance)

Heat exchangers, water-to-water and steam-to-water.....	ASME Boiler and Pressure Vessel Code, 1992, Sections II, V, VIII, IX, and X, as applicable to pressure vessels. Standards of Tubular Exchanger Manufacturers Association, Seventh Edition, 1988.
Heat exchangers with gas-fired appliances.....	Conformance to AGA Requirements for Heat Reclaimer Devices for Use with Gas-Fired Appliances No. 1-80, June 1, 1980. AGA Laboratories Certification Seal.
Heat pump water heating heat recovery systems.....	Electrical components to be listed by UL.

BOILER/FURNACE CONTROL SYSTEMS

(Standards for conformance)

Automatic set back thermostats.....	Listed by UL. Conformance to NEMA DC 3-1989.
Line voltage or low voltage room thermostats.....	NEMA DC 3-1989.
Automatic gas ignition systems.....	ANSI Z21.21-1987 and Z21.21a-1989. AGA Laboratories Certification Seal.
Energy management systems.....	Listed by UL.
Hydronic boiler controls.....	Listed by UL.
Other burner controls.....	Listed by UL.

WATER HEATER MODIFICATIONS

(Standards for conformance)

Insulate tank and distribution piping	(See insulation section of this appendix).
Install heat traps on inlet and outlet piping.....	Applicable local plumbing code.
Install/replace water heater heating elements.....	Listed by UL.
Electric, freeze-prevention tape for pipes.....	Listed by UL.
Reduce thermostat settings	State or local recommendations.
Install stack damper, gas-fueled	ANSI Z21.66–1988, including Exhibits A&B, and ANSI Z223.1–1988.
Install stack damper, oil-fueled	UL 17, November 28, 1988, and NFPA 31–1987.
Install water flow modifiers.....	Commercially available.

WASTE HEAT RECOVERY DEVICES

(Standards for conformance)

Desuperheater/water heaters.....	ARI 470–1987.
Condensing heat exchangers.....	Commercially available components and in new heating furnace systems to manufacturers' specifications.
Condensing heat exchangers.....	Commercially available (Commercial, multi-story building, with teflon-lined tubes institutional) to manufacturers' specifications.
Energy recovery equipment.....	Energy Recovery Equipment and Systems Air-to-Air (1978) Sheet Metal and Air-Conditioning Contractors National Association (SMACNA).

BOILER REPAIR AND MODIFICATIONS/EFFICIENCY IMPROVEMENTS

(Standards for conformance)

Install gas conversion burners.....	ANSI Z21.8–1984, (for gas or oil-fired systems), ANSI Z21.17–1984, ANSI Z21.17a-1990, and ANSI Z223.1–1988. AGA Laboratories Certification seal.
Replace oil burner	UL 296, February 28, 1989 Revision and NFPA 31–1987.
Install burners (oil/gas)	ANSI Z223.1–1988 for gas equipment and NFPA 31–1987 for oil equipment.
Re-adjust boiler water temperature or install automatic boiler temperature reset control.....	ASME CSD–1–1988, ASME CSD–1a-1989, ANSI Z223.1–1988, and NFPA 31–1987.
Replace/modify boilers	ASME Boiler and Pressure Vessel Code, 1992, Sections II, IV, V, VI, VIII, IX, and X. Boilers must be Institute of Boilers and Radiation Manufacturers (IBR) equipment.
Clean heat exchanger, adjust burner air shutter(s), check smoke no. on oil-fueled equipment. Check operation of pump(s) and replacement filters.....	Per manufacturers' instructions.
Repair combustion chambers.....	Refractory linings may be required for conversions.
Replace heat exchangers, tubes	Protection from flame contact with conversion burners by refractory shield.
Install/replace thermostatic radiator valves	Commercially available. One pipe steam systems require air vents on each radiator; see manufacturers' requirements.
Install boiler duty cycle control system.....	Commercially available. NFPA 70, National Electrical Code (NEC) 1993 and local electrical codes provisions for wiring.

HEATING AND COOLING SYSTEM REPAIRS AND TUNE-UPS/EFFICIENCY IMPROVEMENTS

(Standards for conformance)

Install duct insulation.....	FS HH-I-558C, January 7, 1992 (see insulation sections of this appendix).
Reduce input of burner; derate gas-fueled equipment.....	Local utility company and procedures if applicable for gas fueled furnaces and ANSI Z223.1-1988 (NFPA 54-1988) including Appendix H.
Repair/replace oil-fired equipment.....	NFPA 31-1987.
Replace combustion chamber in oil-fired furnaces or boilers.....	NFPA 31-1987.
Clean heat exchanger and adjust burner: adjust air shutter and check CO2 and stack temperature. Clean or replace air filter on forced air furnace.....	ANSI Z223.1-1988 (NFPA 54-1988) including Appendix H.
Install vent dampers for gas-fueled heating systems.....	Applicable sections of ANSI Z223.1-1988 (NFPA 54-1988) including Appendices H, I, J, and K. ANSI Z21.66-1988 and Exhibits A & B for electrically operated dampers.
Install vent dampers for oil-fueled heating systems.....	Applicable sections of NFPA 31-1987 for installation and in conformance with UL 17, November 28, 1988.
Reduce excess combustion air:	
A: Reduce vent connector size of gas-fueled appliances.....	ANSI Z223.1-1988 (NFPA 54-1988) Part 9 and Appendices G & H.
B: Adjust barometric draft regulator for oil fuels.....	NFPA 31-1987 and per manufacturers' (furnace or boiler) instructions.
Replace constant burning pilot with electric ignition device on gas-fueled furnaces or boilers.....	ANSI Z21.71-1981, Z21.71a-1985, and Z21.71b-1989.
Readjust fan switch on forced air gas or oil-fueled furnaces.....	Applicable sections and Appendix H of ANSI Z223.1-1988 (NFPA 54-1988) for gas furnaces and NFPA 31-1987 for oil furnaces.
Replace burners.....	See power burners (oil/gas).
Install/replace duct furnaces (gas).....	ANSI Z223.1-1988 (NFPA 54-1988).
Install/replace heat pumps.....	Listed by UL.
Replace air diffusers, intakes, registers, and grilles.....	Commercially available.
Install/replace warm air heating metal ducts.....	Commercially available.
Filter alarm units.....	Commercially available.

REPLACEMENT FURNACES, BURNERS, AND WOOD STOVES

(Standards for conformance)

Chimneys, fireplaces, vents and solid fuel burning Appliances.....	NFPA 211-1988.
Gas-fired furnaces.....	ANSI Z21.47-1987, Z21.47a-1988, and Z21.47b-1989. ANSI Z223.1-1988 (NFPA 54-1988).
Oil-fired furnaces.....	UL 727, August 27, 1991 Revision and NFPA 31-1987.
Liquified petroleum gas storage.....	NFPA 58-1989.
Ventilation fans:	
Including electric attic, ceiling, and whole house fans.....	UL 507, August 23, 1990 Revision.

AIR CONDITIONERS AND COOLING EQUIPMENT

(Standards for conformance)

Air conditioners:	
Central air conditioners.....	ARI 210/240-1989.
Room size units.....	ANSI/AHAM RAC-1-1982.
Other cooling equipment:	
Including evaporative coolers, heat pumps and other equipment.....	UL 1995, November 30, 1990.

SCREENS, WINDOW FILMS, AND REFLECTIVE MATERIALS
(Standards for conformance)

Insect screens.....	Commercially available.
Window films	Commercially available.
Shade screens:	
Fiberglass shade screens	Commercially available.
Polyester shade screens	Commercially available.
Rigid awnings:	
Wood rigid awnings.....	Commercially available.
Metal rigid awnings	Commercially available.
Louver systems:	
Wood louver systems	Commercially available.
Metal louver systems	Commercially available.
Industrial-grade white paint used as a heat-reflective measure on awnings, window louvers, doors, and exterior duct work (exposed).....	Commercially available.

ATTACHMENT 8 MEASURE SKIPPING CLARIFICATION

“Measure skipping” is defined as follows: *Not installing, in order of decreasing Savings to Investment Ratio (SIR), the cost-justified Energy Conservation Measures (ECMs) and related Incidental Repairs Measures (IRM) included in the work scope produced by the Department of Energy (DOE) approved energy audit tool or priority list. This could also be the result of failure to evaluate all applicable energy saving measures for the dwelling.*

“Major measure” is defined as follows: *A high priority measure, which if skipped, would result in “partial” weatherization of a unit. Major measures are as follows: air sealing, duct sealing outside the thermal boundary, thermal boundary insulation (attic, wall, floor or belly, foundation, sill, etc.)*

Measure skipping of cost-justified major measures is not permitted at any time.

Alteration of the cost-justified work order must be addressed in the following ways:

Funding limitations: If all funds available to be spent on the job will not cover the entire work scope, then measures may be removed from the work order starting with the lowest SIR measure and working up the list from there. The work order must remain overall cost-effective, or the job must be deferred. Necessary Health and Safety (H&S) measures may NOT be removed from the work order, however, ECMs can be removed.

Client refusal-prior to work beginning: Client education is important to inform a client of planned measures and material use. Resistance from a client to install any measures and/or materials planned because of an energy audit-directed work order or priority list should be addressed with either additional education and/or re-running the energy audit with a different - but acceptable - material to determine if the substitute material is cost effective. If no cost-effective option for the material can be identified, the auditor should again explain and discuss the situation with the building owner or occupant. If the building owner or occupant still declines a measure, not defined as a *major measure*, the **auditor must include in the client file a comprehensive justification, including background/source documents that support the decision to skip a specific measure.** All other weatherization measures must be installed. If the auditor **cannot access background/source documents that justifies the building owner/occupant’s decision to decline a measure or the measure is defined as a “major measure,”** the situation must be fully documented in the client file and the job must be deferred due to client refusal.

Client refusal-after a job has begun: Due to scheduling, measures are sometimes installed with a lower priority first. If during the installation process, the client declines a higher priority measure, work must stop at the time the client declined the higher priority measure. No further installation is allowed, and the job must be inspected by a Quality Control Inspector (QCI) and closed out as a completed unit. This should be clearly explained in client file documentation.

Inadequate training: A lack of training for Subgrantees is not an allowable reason to skip measures. Standard procedure should be to postpone job(s) requiring priority measures that cannot be installed due to lack of trained staff until adequate training is acquired.

A General Heat Waste (GHW) measure, as previously approved in the Grantee’s energy audit, may be skipped for any documented reason (including declined by client). GHW measures are not prioritized by the energy audit tool. The measures may be at the top of an approved Priority List, however, there is no strict prohibition from skipping an individual GHW measure.

ATTACHMENT 9

MAXIMUM LIFETIMES OF WEATHERIZATION MEASURES

OVERVIEW

This attachment sets the maximum allowable measure lifetimes that can be used in all Department of Energy (DOE) approved energy audits for all Weatherization Assistance Program (WAP) Grantees. DOE will monitor to this effect.

REVISED MEASURE LIFETIMES

The maximum allowable lifetimes for the following measures have been updated. Note that many of the updated allowable defaults apply only when specific requirements are fulfilled. Please check the relevant footnotes before updating any default measure lifetime

Table 9.1 Revised ECM Lifetimes, years

Measure	Previous Default	Updated Allowable Default
Attic Insulation ¹	20	30
Wall Insulation ²	20	30
Floor Insulation ³	20	30
Kneewall Insulation ³	20	30
Fossil Fuel Furnaces & Boilers ⁴	15 or 18	20
Solar PV	N/A	20

Notes:

1. Applies only to blown-in (e.g., cellulose, fiberglass) and batt insulation
2. Applies only to dense pack insulation, rigid insulation, and full-cavity batt insulation in fully enclosed air-tight cavities
3. Applies to loose-fill and batt insulation installed in fully enclosed air-tight cavities, and rigid insulation
4. Applies to standard and condensing fossil fuel fired units

Table 9.2 of this Attachment is a complete, current list of the maximum allowable measure lifetimes.

DOE will consider other changes on a case-by-case basis. A Grantee may request a longer allowable measure lifetime(s) by submitting the request, along with documentation justifying the request with independent third-party verified research, to the appropriate PO(s).

BACKGROUND

DOE with ORNL's assistance collected and analyzed information and recommendations from Grantees that requested specific ECM lifetime changes. The Grantees provided supporting documentation from manufacturers, suppliers, and weatherization providers for DOE to determine if any of the requested ECM lifetimes could justifiably be extended. As of the release date of this WPN, DOE supports the updated lifetimes for those measures listed in Table 9.1.

The maximum allowable lifetime of any WAP measure is being limited to 30 years because the fuel cost indices which are forecasted by the [Energy Information Agency](#) do not extend beyond 30 years. Since

future fuel cost is integral to the determination of measure Savings to Investment Ratios (SIRs), measure life cannot extend beyond the forecasted period.

Several sources support increasing the lifetimes of fossil-fuel fired heating equipment as described above. However, these sources did not address electrical Heating Ventilation and Air Conditioning (HVAC) equipment such as electric furnaces, heat pumps and air conditioners. The maximum allowable lifetimes for electrically heated and cooled equipment remain the same as previously approved.

SUMMARY OF ALLOWABLE MAXIMUM MEASURE LIFETIMES

Table 9.2 presents the current list of the maximum allowable measure lifetimes, including the increased allowable lifetimes of the measures described above.

Table 9.2
Allowable Default ECM Lifetimes

#	Measure Type	Measure Name	Life (yr.)
1	Building Insulation	Attic insulation: blown in and batt	30
2	Building Insulation	Attic insulation: all other types	20
3	Building Insulation	Sillbox insulation	20
4	Building Insulation	Foundation wall insulation	20
5	Building Insulation	Slab insulation	20
6	Building Insulation	Floor insulation: loose and batt types installed in fully enclosed air-tight cavities, and rigid insulation	30
7	Building Insulation	Floor insulation: all other types including loose and batt <u>not</u> installed in fully enclosed air-tight cavities	20
8	Building Insulation	Wall insulation: dense pack insulation, rigid insulation and full-cavity batt insulation in fully enclosed air-tight cavities	30
9	Building Insulation	Wall insulation: all other types	20
10	Building Insulation	Kneewall insulation: loose and batt types installed in fully enclosed air-tight cavities, and rigid insulation	30
11	Building Insulation	Kneewall insulation: all other types including loose and batt types <u>not</u> installed in fully enclosed air-tight cavities	20
12	Building Insulation	Duct insulation	20
13	Building Insulation	Manufactured home skirting	10
14	Building Insulation	White roof coating	7
15	Building Insulation	Radiant barrier	15
16	Ducts/Infiltration	Whole house air sealing	10
17	Ducts/Infiltration	Duct sealing	10
18	Doors and Windows	Storm window	15
19	Doors and Windows	Window replacement	20
20	Doors and Windows	Door replacement	20
21	Doors and Windows	Storm door	10
22	Doors and Windows	Window shading: awning	10
23	Doors and Windows	Sun screen: fabric or screen	10
24	Doors and Windows	Sun screen: louvered	15
25	Doors and Windows	Window film	15
26	HVAC Systems	Thermal vent damper	10

27	HVAC Systems	Electric vent damper	10
28	HVAC Systems	Intermittent Ignition Device (IID)	10
29	HVAC Systems	Electric vent damper and IID	10
30	HVAC Systems	Flame retention burner	10
31	HVAC Systems	Heating system tune up	3
32	HVAC Systems	Heating system replacement: fossil fuel fired furnaces and boilers, standard and condensing	20
33	HVAC Systems	Heating system replacement: all other heating systems except heat pumps	18
34	HVAC Systems	Smart/programmable thermostat	15
35	HVAC Systems	Air conditioner tune up	3
36	HVAC Systems	Air conditioner replacement	15
37	HVAC Systems	Evaporative cooler	15
38	HVAC Systems	Heat pump replacement	15
39	Baseloads	Lighting retrofit: fluorescent and compact fluorescent	(Note 5)
40	Baseloads	Lighting retrofit: LED	(Note 6)
41	Baseloads	Lighting retrofit: halogen	(Note 7)
42	Baseloads	Refrigerator replacement	15
43	Baseloads	Water heater tank insulation	13
44	Baseloads	Water heater pipe insulation	13
45	Baseloads	Low flow showerhead	15
46	Baseloads	Water heater replacement	13
47	Baseloads	Water heater setpoint reduction	13
48	Solar	Solar PV installations	20

Notes:

5. 10,000 hours
6. 30,000 hours
7. 4,000 hours

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DATA REQUEST

JI PHDR_4 Please provide

- a. spending in 2026 by month by marketing, administration, and program spending for i.: HEIP, ii.: CESP, and iii.: TEE;
- b. Please provide the monthly budget by marketing, administration, and program spending in 2026 for i.: HEIP, ii.: CESP, and iii.: TEE;
- c. State whether the Company has over or under spent the budget for each month, and by how much; and
- d. State whether the Company has over or under recovered for the program(s) for each month, and by how much.

RESPONSE

a.

		HEIP	CESP	TEE
26-Jan	Administration	\$ 4,987.50	\$ 6,757.13	\$ 900.00
	Program	\$ 8,089.25	\$ 8,136.39	\$ 14,467.99
	Marketing	\$ 13,535.71	\$ 16,448.66	\$ -
26-Feb	Administration	\$ 5,582.02	\$ 8,798.42	\$ 2,100.00
	Program	\$ 7,633.71	\$ 6,408.26	\$ 32,977.05
	Marketing	\$ 12,173.85	\$ 17,549.13	\$ -
26-Mar	Administration	\$ 5,350.10	\$ 6,371.17	\$ 1,800.00
	Program	\$ 9,393.24	\$ 6,799.59	\$ 26,349.01
	Marketing	\$ 17,184.61	\$ 17,719.47	\$ -
26-Apr	Administration	\$ 4,025.45	\$ 4,519.81	\$ 2,100.00
	Program	\$ 8,342.37	\$ 8,669.71	\$ 26,508.28
	Marketing	\$ 13,145.87	\$ 17,571.41	\$ -
26-May	Administration	\$ 5,632.87	\$ 9,671.92	\$ 1,800.00
	Program	\$ 9,263.22	\$ 7,859.40	\$ 27,263.95
	Marketing	\$ 15,076.68	\$ 33,896.99	\$ -
26-Jun	Administration	\$ 4,842.27	\$ 5,976.21	\$ 2,700.00
	Program	\$ 10,564.06	\$ 11,811.27	\$ 47,450.15
	Marketing	\$ 14,256.63	\$ 22,309.32	\$ -

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b. through d. The Company does not prepare a monthly budget nor calculate its over or under monthly. Rather these calculations are completed on an annual basis for its November update.

Witness: Stevi N. Cobern

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DATA REQUEST

JI PHDR_5 Please refer to the hearing testimony of Stevi Cobern at HVT 09:36:00 to 09:38:00 a.m., Exhibit SNC-R1, and Exhibit SNC-R2, and confirm that the Company calculates lost revenues using an anticipated average energy savings per ratepayer served under each program, and not related to actual installed measures. If anything other than confirmed, explain.

RESPONSE

Please see the Company's response to KPSC PHDR_3.

Witness: Stevi N. Cobern

Witness: Lerah M. Kahn

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DATA REQUEST

JI PHDR_6 Please refer to the hearing testimony of Stevi Cobern at HVT 10:11:00 to 10:13:00 a.m. and the Company's Response to Joint Intervenor's initial data request number 9, and state how many contractors have been "secured" for

- a. HEIP,
- b. CESP lighting, and
- c. CESP HVAC.

RESPONSE

a. HEIP,

HEIP Subcontractor for Home Energy Assessment and Direct Install – 1
HEIP Trade Allies for rebate measures – 3 (HVAC, Insulation)

Note: Contractors do not have to be rebate trade allies for customer projects.

b. CESP lighting, and

CESP Lighting Trade Allies - 6

Note: Contractors and customers do not have to be trade allies to submit CESP projects.

c. CESP HVAC

CESP HVAC Trade Allies – 6

Note: Contractors and customers do not have to be trade allies to submit CESP projects.

Witness: Ryan L. Lake

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DATA REQUEST

JI PHDR_7 Provide communications between TRC and the Company concerning implementation of the HEIP and CESP. Please include in your response all presentations, meeting notes, and written updates in addition to electronic communications and phone logs.

RESPONSE

The Company objects to this request as being vague, overly-broad, and unduly burdensome. The request seeks all communications between the Company and the entity implementing two DSM programs over an undefined period of time. The breadth of the request is designed to harass and burden the Company and not to provide relevant information regarding the subject of this case which is the updated calculation of DSM surcharges. Without waiving this objection, the Company responds that it has filed a motion for extension of time to compile and produce this voluminous response. Please also see KPCO_R_JI_PHDR_2_Attachment1 for all meeting presentations.

Witness: Ryan L. Lake

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DATA REQUEST

JI PHDR_8 Please refer to the hearing testimony of Stevi Cobern at HVT 10:20:00 to 10:21:08 a.m., and provide the resume of the external affairs employee Ryan Lake. To the extent not evidence of the face of that resume, please explain in full that employee's qualifications and experience with respect to demand-side management program implementation.

RESPONSE

Mr. Lake has a communications degree with a minor in marketing from Walsh University in North Canton, Ohio.

Prior to starting with Appalachian Power Company ("APCo"), Mr. Lake held roles in customer service working for Enterprise Rent-A-Car and a running a small business.

He began his career with AEP in 2017 as a Customer Service Account Manager. In this role, he managed residential, commercial, and industrial customer accounts. This included handling of work orders, billing inquiries including high usage concerns, new installs, service upgrades, distributed generation projects from initial application through installation, and maintaining relationships with county and city officials.

In 2024, Mr. Lake was hired as an External Affairs Manager with Kentucky Power in the Ashland area. In this role, he builds and maintains strong relationships with local and community leaders, including members of county commissions and city governments. Additionally, Mr. Lake takes lead on volunteering and community outreach for Kentucky Power in the Ashland district.

This experience in customer service and working with members of the community provides an ideal background for the Company's demand side management programs.

Witness: Ryan L. Lake

VERIFICATION

The undersigned, Stevi N. Cobern, being duly sworn, deposes and says she is the Distribution Operations Customer Support Manager for Kentucky Power, that she has personal knowledge of the matters set forth in the foregoing responses and the information contained therein is true and correct to the best of her information, knowledge, and belief.

Stevi N. Cobern

Stevi N. Cobern

Commonwealth of Kentucky)

)

County of Boyd)

Case No. 2025-00365

Subscribed and sworn to before me, a Notary Public in and before said County and State, by Stevi N. Cobern, on July 13, 2026.

Marilyn Michelle Caldwell
Notary Public

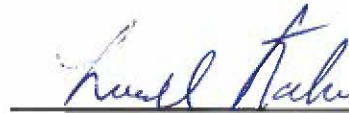
My Commission Expires May 5, 2027

Notary ID Number KYNP71841

MARILYN MICHELLE CALDWELL
Notary Public
Commonwealth of Kentucky
Commission Number KYNP71841
My Commission Expires May 5, 2027

VERIFICATION

The undersigned, Lerah M. Kahn, being duly sworn, deposes and says she is the Manager of Regulatory Services for Kentucky Power, that she has personal knowledge of the matters set forth in the foregoing responses and the information contained therein is true and correct to the best of her information, knowledge, and belief.



Lerah M. Kahn

Commonwealth of Kentucky)
)
County of Boyd)

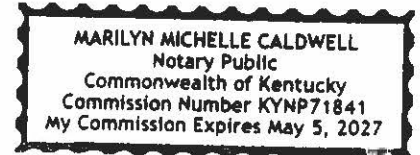
Case No. 2025-00365

Subscribed and sworn to before me, a Notary Public in and before said County
and State, by Lerah M. Kahn, on July 14, 2026.


Notary Public

My Commission Expires May 5, 2027

Notary ID Number KYNP71841



VERIFICATION

The undersigned, Ryan L. Lake, being duly sworn, deposes and says he is a External Affairs Manager for Kentucky Power, that he has personal knowledge of the matters set forth in the foregoing responses and the information contained therein is true and correct to the best of his information, knowledge, and belief.

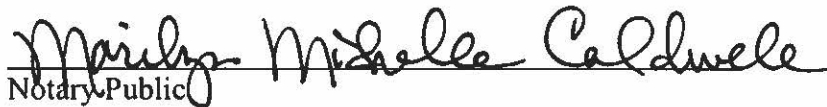


Ryan L. Lake

Commonwealth of Kentucky)
)
County of Boyd)

Case No. 2025-00365

Subscribed and sworn to before me, a Notary Public in and before said County and State, by Ryan L. Lake, on July 14, 2026.


Notary Public

My Commission Expires May 5, 2027

Notary ID Number KYNP71841

