

Mass Save

Home Energy Services Program

Sponsored by NSTAR and National Grid

2011 Contractor Kick-Off Meeting

May 26, 2011





Agenda and Key Discussion Points

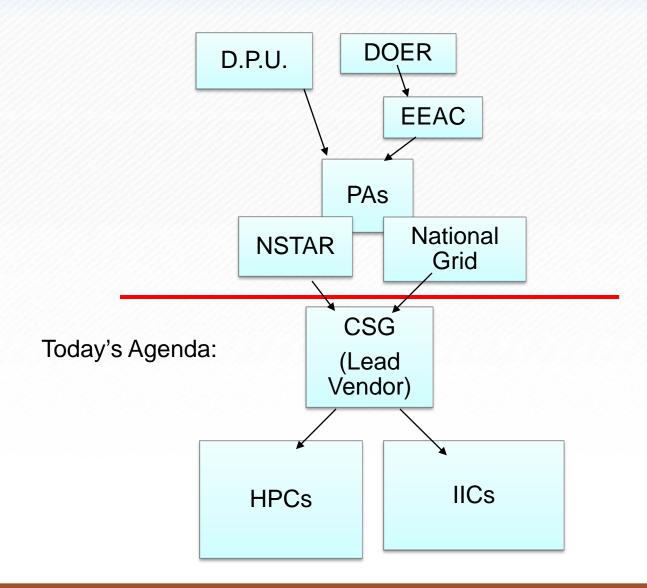
- Welcome & Introductions
- Roles & Responsibilities
- Program Changes & Transition Plans
- New Work Flow Processes
- Merit-Based Work Allocation System
- Customer referral process
- Next Steps
- Participation Agreement
- Questions & Answers



Roles & Responsibilities

- Program Administrators (PAs)
- Lead Vendors (LVs)
- Home Performance Contractors (HPCs)
- Independent Installation Contractors (IICs)







- Program Administrators (PAs)
 - NSTAR and National Grid (both gas & electric)
 - Program design and administration
 - Oversight of CSG & of CRI (statewide QA/QC vendor)
 - Reporting to state agencies
 - Coordination with other PAs to create statewide consistency whenever possible:
 - Mass Save Home Energy Services (HES) program model
 - Weatherization Materials and Installation Standards
 - Home Energy Assessment guidelines
 - Marketing materials



- Lead Vendors
 - Conservation Services Group
 - For NSTAR and National Grid customers only
 - Program management and achievement of goals
 - Provide Home Energy Assessments (HEAs)
 - Oversight of IICs & HPCs
 - Reporting to PA clients
 - Merit Based Allocation of Work
 - Quality Control



- Independent Installation Contractors (IICs)
 - IIC may pre-qualify customers, "tag" them, and refer them to the Mass Save Program:
 - Requires site visit, work scope & Participating Contractor Referral (PCR) form submittal
 - CSG conducts Home Energy Assessment (HEA)
 - CSG returns approved work scope to IIC
 - Customer choice prevails if duplicate PCR is submitted
 - Unaffiliated customers will be assigned to IICs via the Merit-Based Work Allocation system. (Customer choice allowed to over-ride)
 - May <u>not</u> use Mass Save's and/or PAs' names and/or brands for marketing without prior approval



- Home Performance Contractors (HPCs)
 - HPCs responsible for their own customer acquisition
 - HPC conducts the Mass Save HEA
 - Energy assessment software provided by CSG for NSTAR & National Grid HEAs only
 - HPC develops & completes scope of work
 - Unaffiliated customer work <u>not</u> assigned to HPCs
 - May <u>not</u> use Mass Save's and/or PA's names and/or brands for marketing without prior approval



Mass Save Operations Main Processes

	Customer entry point		
Process Steps	Lead Vendor / Program Administrator	Home Performance Contractor (HPC)	Independent Installation Contractor (IIC)
Customer outreach	Call Center Lead Vendor / Program Administrator	НРС	IIC
Energy Assessment	Lead Vendor	HPC	Lead Vendor
Installation	Assigned Contractor	НРС	IIC
Quality Assurance/ Quality Control (QA/QC)	Lead Vendor or Third party QA/QC Vendor	Lead Vendor or Third party QA/QC Vendor	Lead Vendor or Third party QA/QC Vendor



Program Changes for 2011

- Higher program pricing
- HEAs within 15 business days of request
- Eliminate two-tiered visits; moving back to single visit
- Introduction of new HEA software & reports
- HEAT Loan expansion
 - \$500 up to \$25,000
 - Now over 40 banks and credit unions participating
- IICs & HPCs have expanded roles & responsibilities
- Single visit HEAs began May 16th



Transition Plans

- Integration of NSTAR and National Grid Gas Weatherization Programs into new Program
 - June 30th is the last day to submit a Participating Contractor Recommendations Report (PCRR) via fax or email to CSG under current Program procedures
 - Must submit list to EFI of all customers in pipeline
 - Pipeline = customers submitted via PCRR by June 30th
 - All projects must be completed and all rebate applications must be submitted to EFI and <u>postmarked</u> no later than Friday, August 31st



Transition Plans (Continued)

- New IIC Participation Agreements available now
 - All attendees will receive a follow-up email with another link to the IIC Participation Agreement and a cover page/checklist to be submitted with it:
 - Must include:
 - legal contact information
 - W-9 (tax ID form)
 - insurance certificate
 - see Participation Agreement for limits
 - must name CSG and PAs as additional insureds



Transition Plans (Continued)

- New insulation pricing in effect for new projects assigned after full execution of a new IIC Participation Agreement
- Merit Based Work Allocation System begins with work performed under new Participation Agreement



Merit-Based Work Allocation System

- Individual jobs receive scores
- Individual job scores averaged for a contractor grade
- Based upon grades, contractors grouped into tiers
- Jobs filtered by technical proficiencies and geography as declared by each IIC
- Jobs assigned based on ranking in tiers



Merit-Based Work Allocation System (Cont.)

- Initial 2 to 3 months of new Program:
 - Work Orders assigned on a rotational basis to those who execute a new IIC Participation Agreement
 - IICs are also able to bring work in via a new Participating Contractor Referral (PCR) form
 - Each job will be inspected and scored



Merit-Based Work Allocation System (Cont.)

- At end of Initial 2 to 3 months of new Program:
 - Accumulated jobs scores make up an IIC's initial grade
 - IICs will be ranked based on the grade established from the body of work completed
 - All ranked IICs with grades above a minimum threshold are placed in 3 tiers:
 - Top tier receives twice as many work assignments as middle tier
 - Middle tier receives twice as many work assignments as bottom tier



Merit-Based Work Allocation System (Cont.)

- After Initial 2 to 3 months of new Program:
 - New IICs are allowed to come on board at any time
 - Must bring all customers in via PCR
 - The new IIC's initial grade is calculated once 5 jobs are scored
 - Entered into the tiers based on grade
 - Grades recalculated monthly to establish rank in the 3 tiers:
 - Top tier receives twice as many work assignments as middle tier
 - Middle tier receives twice as many work assignments as bottom tier



IIC Workflow Process

- 1. Customer calls Mass Save requesting services
 - If customer identifies a contractor, note made in the database
 - PCR must be received at CSG before HEA to complete "tag"
- 2. HEA within 15 business days
 - Work scope developed at HEA
- 3. Customer Contract presented with HEA report
 - Non-affiliated customers may choose an IIC or have one assigned by the Program
 - Customer affiliation with an IIC through the Contractor Referral process is confirmed
 - Customer's IIC choice always prevails



IIC Workflow Process (Continued)

- 4. CSG executes Customer Agreement and Collects 1/3 of Customer Cost Share as down payment upon execution
- 5. CSG Assigns performance of that agreement to IIC
- 6. Assigned work orders must be acknowledged and accepted within 2 business days
- 7. IIC completes work, then:
 - Submits completion documentation to CSG
 - CSG remits payment to IIC of customer down payment and PA cost share within 15 days
 - Bills Customer directly for remaining 2/3 of Customer Cost Share



Next Steps - IICs

- IICs will receive an "on-boarding" email with instructions to:
 - Download agreement
 - Execute the agreement
 - Complete an IIC Participation Agreement Cover Sheet to:
 - Accompany submittal of agreement
 - Provide legal company name, address, point of contact
 - Communicate any geographic limitations for performing work (select counties, zip codes)
 - Communicate technical proficiency choices:
 - Will perform air-sealing only jobs (assigned in separate rotation)
 - Will perform installation of wall insulation with asbestos siding
 - Will perform installation of wall insulation with aluminum siding
 - Includes submittals checklist (W-9, Certificate of Insurance, etc.)



Next Steps - IICs (Continued)

- IIC "on-boarding" email will also include instructions for:
 - Participating in a follow-up IIC Training
 - Topics will include:
 - Work Flow Procedures
 - Technical Requirements
 - General Programmatic Requirements
 - Will take place beginning in June
 - All are strongly encouraged to attend (even if previously participated in prior program years as subcontractor to CSG)



Next Steps - HPCs

HPCs:

- Will receive a Kickoff Meeting Invitation
- Invitation will go out to all on the mailing list
- Those continuing to proceed as IICs are asked to opt-out of communications unrelated to them
- Email messages will thereafter be sent to two distinct groups



Q&A

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