



IRA HOMES & HEEHR Rebate Program

Docket No. Q023100733

May 21, 2024



Contents



- Company Credentials
- Solution Overview
- IRA Data Requirements



Program Delivery Solution



New Jersey Board of Public Utilities

is seeking input on how best to deliver federal HOMES program and HEEHR program formula funding alongside current efficiency and electrification incentives in New Jersey in order to advance the electrification of 400,000 additional residential dwelling units and 20,000 additional commercial spaces

There are a number of equally valid approaches to serving the energy efficiency needs of buildings in low-income communities. This response details a solution for ensuring efficient delivery of these programs with respect to the data collection, verification, outreach, contractor adoption, and customer experience.

We believe Hancock Software is uniquely suited to address NJBPU HOMES & HEEHR Rebate Program needs:

By providing proven out-of-the-box PaaS capability that can be configured to operate all residential, small business, large commercial and industrial energy efficiency programs in one platform while facilitating the collection and reporting on the data requirements to ensure compliance with all the different program rules.



Solution Scope



This RFI seeks responses to a number of questions regarding the approach, suitability, and overall design of programs for the efficient distribution of IRA funding. Hancock Software is being used successfully to implement eighteen statewide DOE funded income eligible single family and multifamily energy efficiency and electrification programs. While we do not design programs, we provide a configurable platform-as-a-service that facilitates the life-cycle qualification, assessment, installation, inspection, reporting and compliance assurance of multiple simultaneous energy efficiency programs no matter the chosen approach or program design. Hancock Cloud is already proven in its ability to deliver on all of the data collection, tracking and reporting needed throughout the course of the two residential rebate programs authorized by Sections 50121 and 50122 of the Inflation Reduction Act (IRA) and fully supports the DOE/PNNL workflows and APIs for rebate processing.





Credentials

Proven Experience

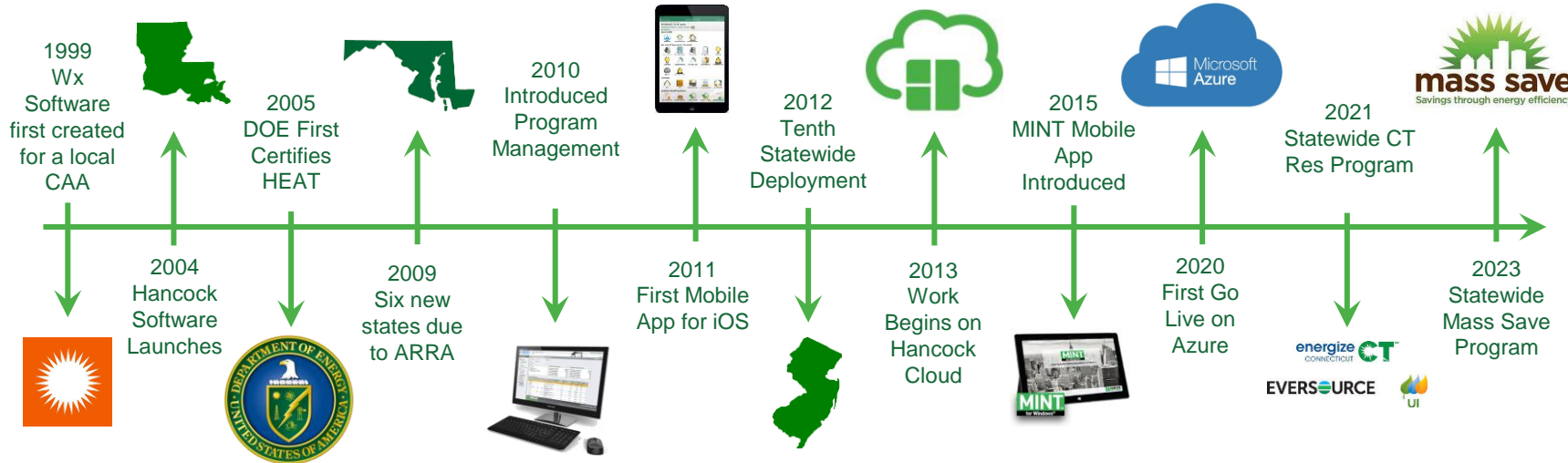


DOE did not develop the “IRA Home Energy Rebates; Data & Tools Requirements Guide” in a vacuum. Though adjusted for certain new statutory requirements (like BPI 2400 compliant energy modeling), the program guidelines are in large part modeled after the highly successful Weatherization Assistance Program that has evolved since its inception in 1976.

Hancock Software’s solutions have enabled State Housing Offices in their delivery of WAP assistance for more than 20 years. This includes the State of New Jersey Department of Community Affairs which has been using Hancock Software since 2012. Today, Hancock Software is responsible for the distribution of more than one-third of DOE’s WAP funding nationwide in eighteen states.



Hancock Software Background



34 Utilities with Energy Efficiency Programs using Hancock Software



Residential EE Program Success



- Statewide program for income eligible Wx and home repair
- Brings together Utility and DOE funding in one home visit
- BGE, Delmarva Power, FirstEnergy, Pepco, SMECO and Washington Gas



- Statewide Home Energy Solutions Program
- Market and income eligible residential jobs
- On-bill financing options
- DOE Home Energy Score integration
- Eversource Electric, Eversource Gas, United Illuminating, CNG, and Southern CT Gas



- Statewide income eligible Wx program
- Electric, Gas, Health & Safety measures
- Multiple funding sources
- Same platform used also for DOE multi-family Wx, and Bill Pay
- Fourteen PUs, COOPs, and Municipal Utilities





Solution Overview

Hancock Cloud

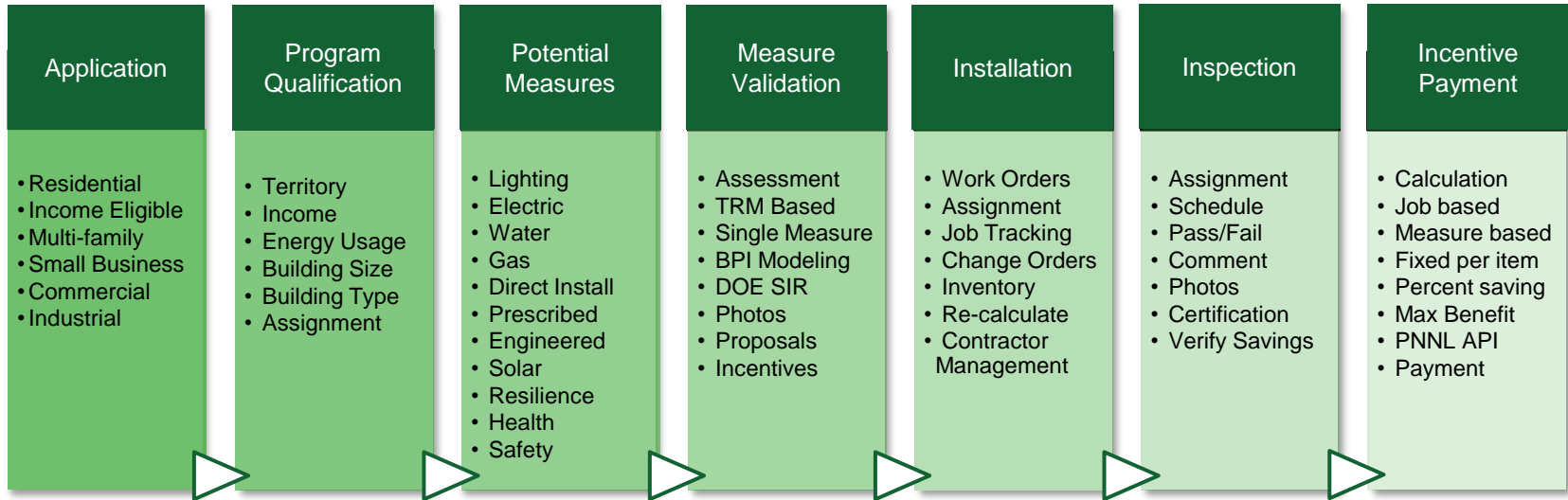


Hancock Cloud is a proven platform consisting of services that can be enabled by Hancock Software's customer success team to support any type of income qualified energy program. In the Hancock Cloud platform, the various program's managers, support staff, fuel vendors, community action agencies, end clients, energy services providers, assessors, installation contractors and crews conduct their activities online providing deep program transparency and real-time access to all work in process.

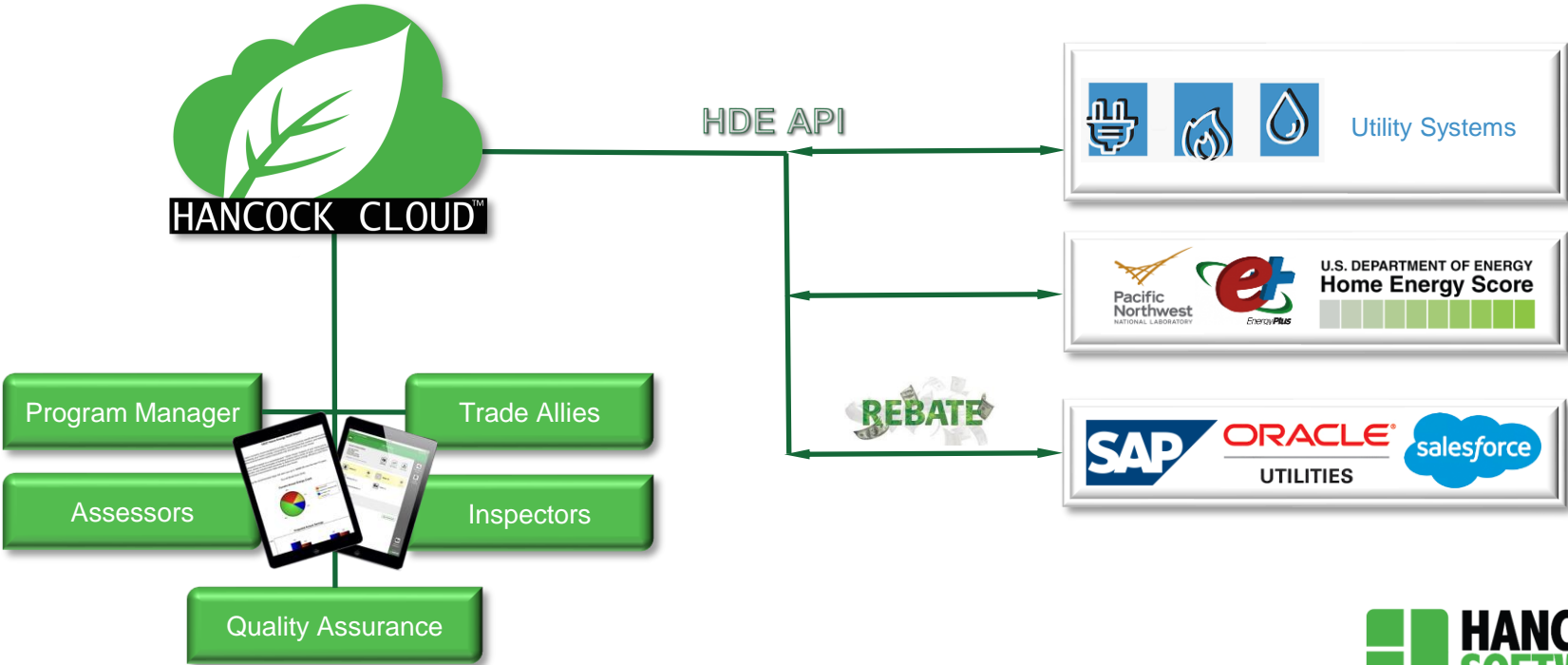
Delivered in a modern, secure, scalable, Microsoft Azure PaaS environment, Hancock Cloud is easily configurable by program administrators for tracking residential, small business, multifamily, and large commercial energy efficiency rebate programs with NO custom coding required.



Hancock Cloud Overview



Solution Overview



Hancock Cloud Benefits



- Proven off-the-shelf energy efficiency program management platform
- Client portal for homeowners/building owners to apply and collaborate with program stakeholders
- Offline mobile application used by assessors, installers, and inspectors facilitates data and photo collection and organization that promotes better adoption by trade allies and other program stakeholders while delivering uniform customer experience
- Guided workflow management tailored for IRA Sections 50121 and 50122 rebates and fully supports the DOE/PNNL workflows and APIs for rebate processing.
- Qualification rules engine that enables braiding of disparate funding sources into one retrofit project while collecting necessary data to ensure compliance.
- Guided mobile data collection accelerates training and workforce development



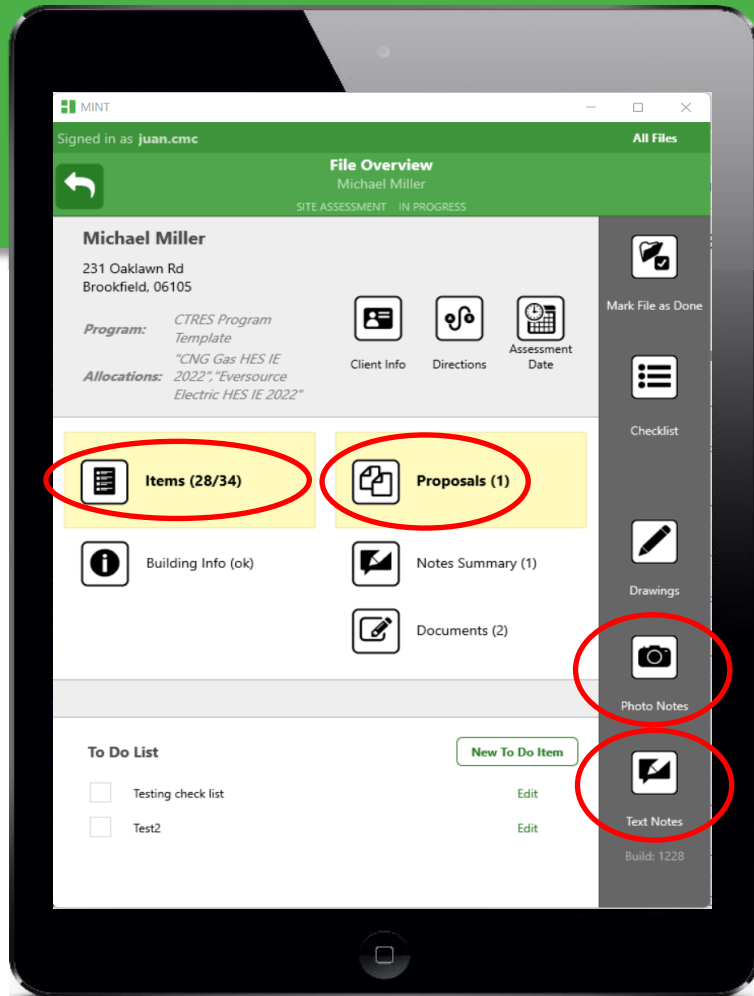
Planning for IRA with Hancock Cloud



Meeting IRA Challenges

1. Coordinate IRA funds with state and utility programs and tax credits
2. Flexible modeled savings analysis and quality assurance
3. Multi-family weatherization
4. Accelerating workforce development

MINT™ Mobile Tool



Easy to Use

- ✓ Offline guided navigation expedites field data collection with no Internet connection needed
- ✓ Data collection, savings analysis, and proposals in one visit for energy efficiency retrofits
- ✓ Full catalog of energy savings measures
- ✓ Capture notes with native device microphone
- ✓ Assessment, Installation, and Inspection modes

Data Security

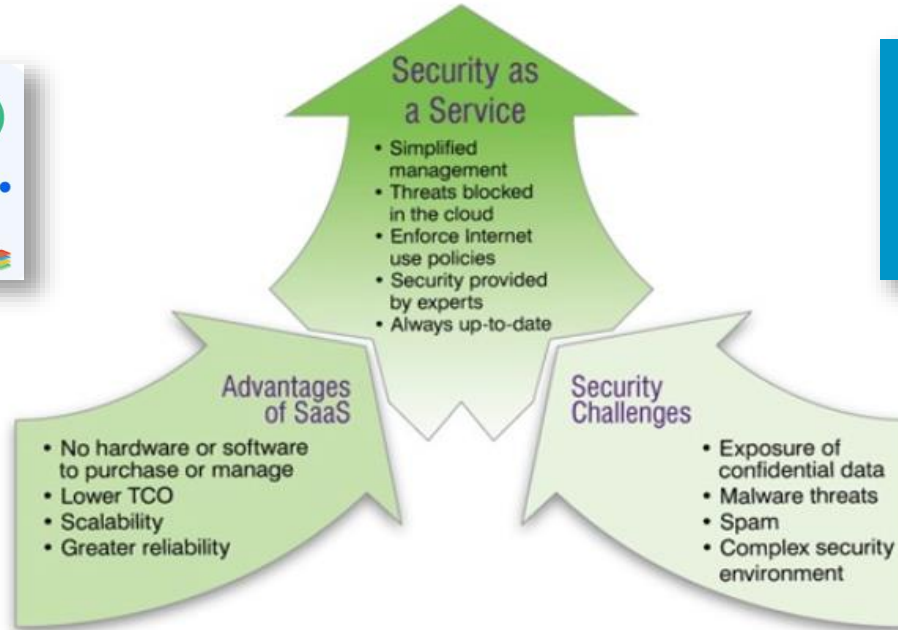


By definition, income eligible programs require the collection of sensitive personal information. DOE program guidance is explicit in the urgency of maintaining the security of the information collected to qualify and verify homes for rebates. The statute mandates that programs facilitate data sharing between stakeholders while in an environment that meets the most stringent security protocols that are regularly audited for compliance. Vetting households and buildings can *NOT* be secured when done in spreadsheets or other offline tools.

Protection of PII data has been at the core of Hancock Software solutions throughout our history. Hancock Cloud leverages the most advanced and continuously improving technologies and methods for securing your clients data.



Security as a Service





IRA Data Requirements

IRA Data Requirements in Hancock Cloud



The DOE first published the “IRA HOME ENERGY REBATES: DATA & TOOLS REQUIREMENTS GUIDE” on October 13, 2023. Right from the start, Hancock Cloud was already able to implement almost the entirety of these requirements right out of the box based on our years of DOE WAP experience. Since the release of the guidelines, we have been developing the few new isolated features needed to fulfill all of the requirements.

Integral to these requirements were a series of workflows the DOE/PNNL team has developed to define how rebate transactions will occur, create plans for data collection and reporting, and implement these programs in accordance with the DOE program and data requirements. The workflows outline step-by-step actions that various rebate participants undertake, how their actions relate to one another, and what data is collected and/or reported at each step. Hancock Cloud is able to administer all of the 50121 and relevant 50122 workflows for rebate processing.



SCEP

STATE & COMMUNITY ENERGY PROGRAMS

IRA HOME ENERGY REBATES: DATA AND TOOLS REQUIREMENTS GUIDE

Introduction

This guide is intended to assist states and their designees in developing and executing data collection, tracking, and reporting plans as needed to effectively implement two residential rebate programs authorized by Sections 50121 and 50122 of the Inflation Reduction Act of 2022. The guide is into five parts; parts 1, 2, and 3 address data requirements while parts 4 and 5 focus on data systems and rebate process workflows. These requirements are in collaboration with and will be included on the Federal Assistance Reporting Checklist (FARC) as part of the award package.

This document provides the program requirements as determined by the DOE to meet the statutory requirements of IRA Section 50121 and Section 50122. States must develop programs that comply with the programmatic requirements presented in this document.

Utilization of DOE/PNNL API

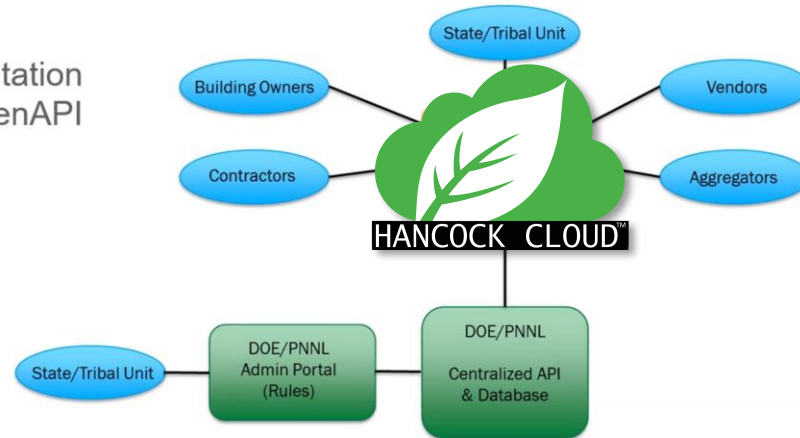


DOE/PNNL Centralized Draft API Overview

- A REST API
- OpenAPI (Swagger) Documentation
- Seeking feedback on draft OpenAPI spec for the API

Design Philosophy:

- As simple as possible to use
- As flexible as needed



Utilization of DOE/PNNL API

[ABOUT](#)[NEWS & MEDIA](#)[CAREERS](#)[EVENTS](#)[SEARCH](#)[RESEARCH](#)[PEOPLE](#)[PARTNER WITH PNNL](#)[FACILITIES](#)

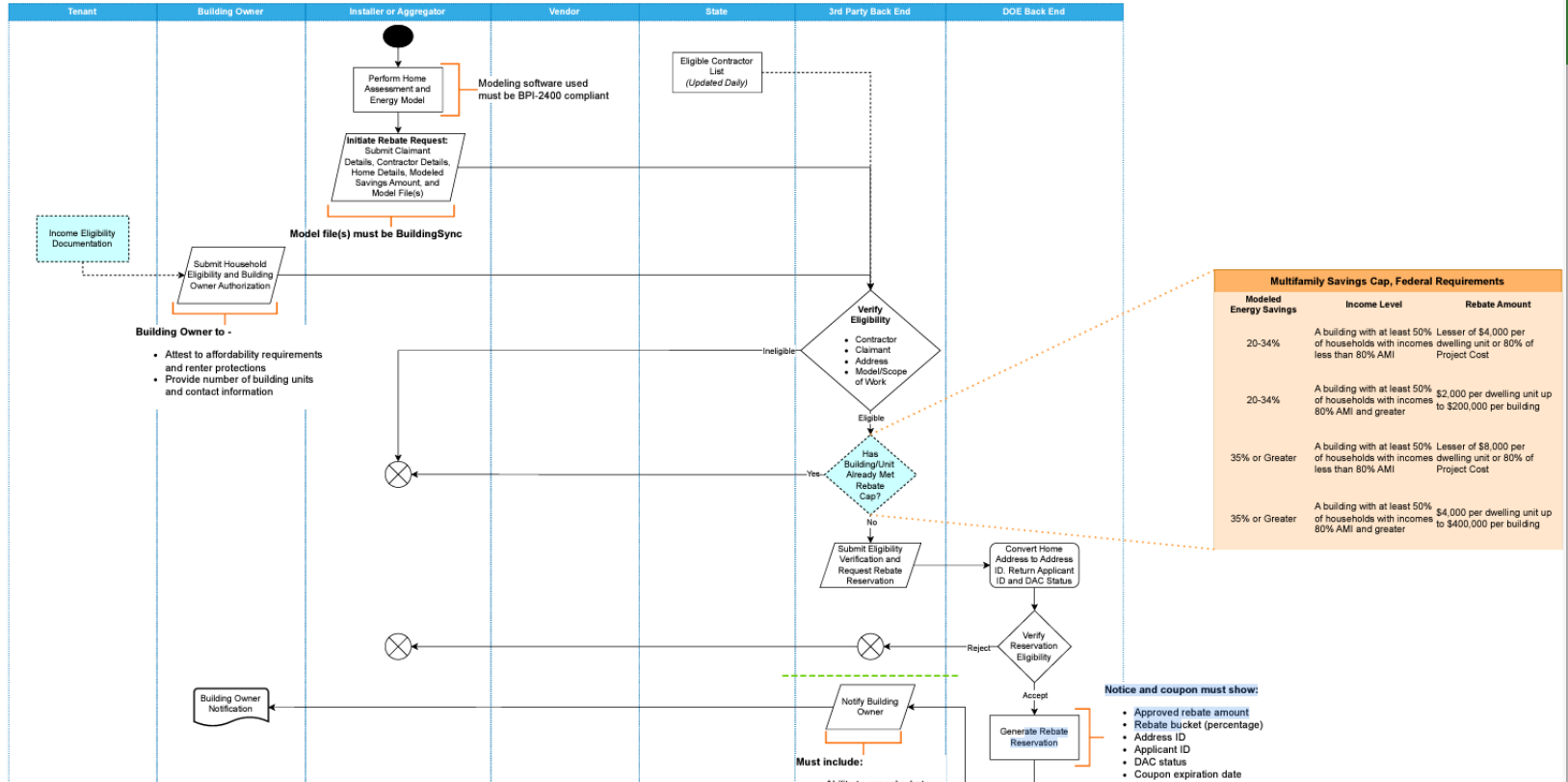
Process Workflows

PNNL recognizes that the success of the Home Energy Rebate programs hinges not only on a robust API but also on actionable workflows. These workflows define the step-by-step procedures that relevant stakeholders (such as state energy offices, implementers, and vendors) planning to use the DOE Rebate API will follow to participate in and administer the program effectively. The table below outlines the possible avenues to claim Home Energy Rebates, and each hyperlink leads to the proposed workflow.

Workflow	Title	Rebate Redeemed at Point of Purchase	Updated
1	Measured Rebate Initiated by The Aggregator/Installer for A Single-Family, Owner-Occupied Home	No	May 8, 2024
2	Measured Rebate Initiated by The Aggregator/Installer for A Single-Family, Tenant-Occupied Home	No	May 8, 2024
3	Measured Rebate Initiated by The Aggregator/Installer for A Multi-Family, Tenant-Occupied Building	No	May 8, 2024
4	Modeled Rebate Initiated by The Installer for A Single-Family, Owner-Occupied Home	No	May 8, 2024
5	Modeled Rebate Initiated by The Installer for A Single-Family, Tenant-Occupied Home	No	May 8, 2024
6	Modeled Rebate Initiated by The Installer for Multi-Family, Tenant-Occupied Building	No	May 8, 2024

Utilization of DOE/PNNL API

Modeled Rebate Initiated by the Installer for a Multi-Family, Tenant-Occupied Building



Hancock Cloud Workflow Management



HANCOCK CLOUD™

Hancock Software, Inc. x +

https://commercial.hancocksoftware.com/HEEC/project

Apps Gmail Google Drive LinkedIn HubSpot GoToMeeting Lily's GoToMeeting MINT Webinar LIHEAP/WAP Webin... HelloSign Hancock Portal ZenDesk Energy Central EOC - Dropbox DCG SOC2

Fonzarelli Harley Davidson Dealership 0000341 Commercial, Eversource, National Grid Hancock Software Demonstration 1234 Any Street Newton MA 01700 12/31/2020 \$21,162.00 \$0.00 \$97,307.00 \$0.00

Project Info Client Info Building Info All Reports Save Cancel

Client Name: Fonzarelli Harley Davidson Dealership Job Number: 0000341 Incentive Percentage: 70 Incentive: \$ 17,035.41

Program Template: (DEMO) Direct Install Small Busines... Total Price: \$ 24,336.30 Allocations: Commercial x Eversource x National Grid x

Project Info

Schedule & Document

View Schedule More New Save Cancel Total: 2

Activity	Task	Person	Scheduled Date	Duration
<input type="checkbox"/>	Activity			
<input type="checkbox"/>	Assessment	Kevin Charbonneau	12/31/2020	
<input type="checkbox"/>	Activity			
<input type="checkbox"/>	Install	Carlos Dantas Demo Account	1/4/2021	
<input type="checkbox"/>	Inspect			
<input type="checkbox"/>	Design			

Document Type

Measure Management

Measure Management Set Default Measure Set Default Cost Total: 6

Det...	Area	Measure Name	Qty	Unit Cost	Labor Cost	Incentive / Rebate	Total Cost	Inspector	Order Date	Installer	Install Finish	Inspection Date	Inspection Status	Allocation	BudgetType	Call Back	Com	
		(All)															(All)	
<input type="checkbox"/>	Detail	Showroom	Decorative Wall Sconce with (1) 10w LED Lamp - DW10ED	12	\$45.00	\$300.00	\$840.00			Carlos Dantas Demo Account				Eversource				

Manage Projects

- ✓ View/edit audit results
- ✓ Create multiple Work Orders
- ✓ Assign installers and inspectors
- ✓ Track project status and changes in real-time
- ✓ Role based data visibility and security

Modeled or Measured?



NJBPU is seeking input on whether modeled or measured analysis is the best approach for multifamily buildings. We believe this is a false choice.

First, there will be different cases where one or the other method will be more suited. Hancock Cloud enables either the modeled or measured pathway for rebates to be decided on a case-by-case basis and then collects and organizes the appropriate data for rebate processing accordingly.

Second, in practical application, every multifamily building will be modeled AND measured regardless of the rebate pathway selected. In the measured pathway, you will first need to model energy savings to determine the appropriate conservation measures, and in the modeled pathway you will need to come back and verify at least 70% of the savings.

IRA Challenges

- States are encouraged to allow applicants to establish their eligibility through a variety of means, including categorical eligibility, documentation of income, and self-attestation.
- Documentation must demonstrate that the State imposes income requirements equivalent to or less than 80% AMI, or less than 150% AMI, or that a participating multifamily building has at least 50% with households less than 150% AMI.
- When stacking benefits, other program's eligibility requirements must be enforced simultaneously

Hancock Cloud Client Setup



HANCOCK SOFTWARE Admin Allocation **Application** Configuration Container Measure More

HANCOCK CLOUD support

Application - juan Smith - Eligible

Application Info Application Qualification

Cancel Save Save Settings

- ▶ Contact
- ▶ Landlord Information
- ▶ Consumption
- ▼ Questions and Answers
- ▶ Document
- ▶ Comments

Client Setup

- ✓ Collect/Import household data
- ✓ Includes contact demographics, utility usage data, required document uploads
- ✓ Can be made available to building owner for self-intake
- ✓ Setup screens easily reconfigured through the user interface as new programs are added

Hancock Cloud Client Qualification



Application - REBECCA M Smith - Eligible

REBECCA Smith [09/12/2019] X

Application Info Benefits History

Qualify Certify Undo Certify

Denied Denied Reason: none Denied Date: [calendar icon]

Qualified Allocation

<input type="checkbox"/>	Allocation	Certified Date	Additional Benefit
<input type="checkbox"/>	2019 HEAP-WPO		\$0.00
<input type="checkbox"/>	2019 HEAP		\$0.00
<input type="checkbox"/>	2019 FAST TRACK		\$0.00
<input type="checkbox"/>	2019 ECIP-WPO		\$0.00

Messages

Allocation Name	Messages
2019 ECIP-WPO	Eligible for \$294.00 from 2019 ECIP-WPO (2019, Humboldt, Poverty Group 3, Benefit Amount 294.00)
2019 ECIP-WPO	New Benefit Record Created.
2019 FAST TRACK	Client required information check failed for Pledge date must be filled in, Atleast one Emergency Status is required to qualify
2019 FAST TRACK	New Benefit Record Created.
2019 HEAP	Eligible for \$294.00 from 2019 HEAP (2019, Humboldt, Poverty Group 3, Benefit Amount 294.00)

10/16/2019 9:13 :00 AM
10/16/2019 9:13 :00 AM

Client Qualification

- ✓ One-click application of all program rules
- ✓ Automatically identifies which programs are qualified for that particular household
- ✓ Messages why household may not qualify for certain programs
- ✓ Restricts available measures and incentives to only those that are qualified

IRA Challenges

- Ensure that rebates are not applied to specific energy efficiency upgrades funded with other Federal grants or rebates.
- Document and photo original components and upgraded replacement measures.
- Ensure the rebate does not exceed the total project cost when combined with other permissible/eligible program rebates.
- Model energy savings based on the data and information collected in the home.

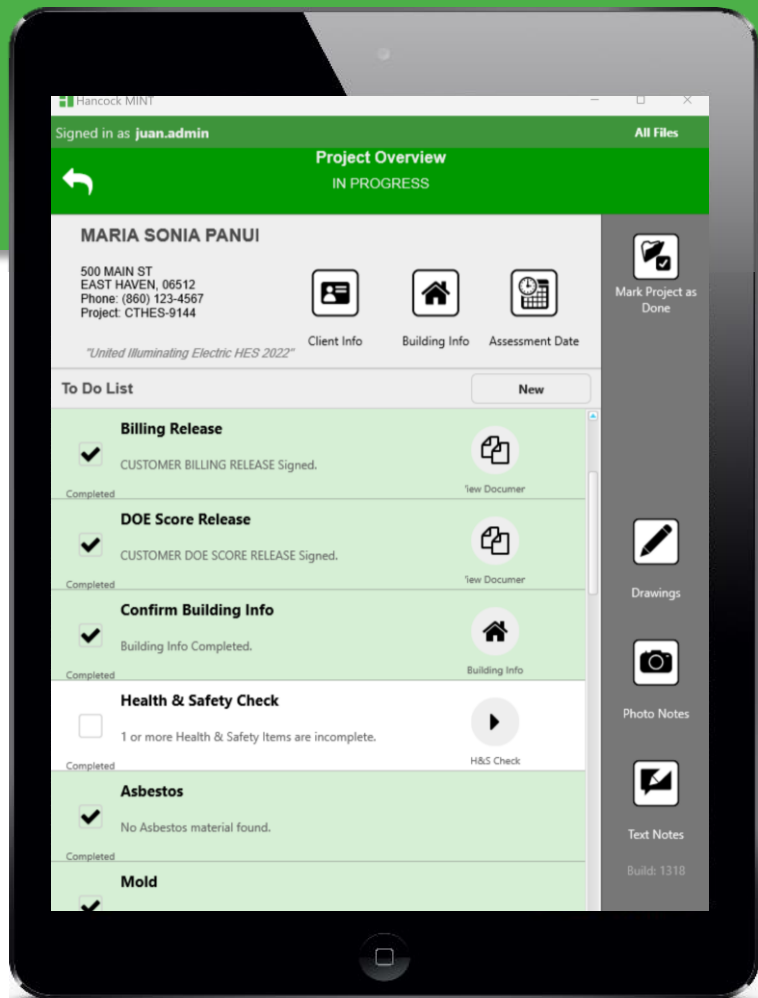
Hancock Cloud Measures Setup

(DEMO) Direct Install Small Business Program Search by Name Lighting Fixture

Name	MaterialCost ↑	LaborCost	Number of Lamps	Lamp Watts	Watts	Measure Code	Manufacturer	IsRecommendationI...
6 in Can-LED-Frosted-Recessed (LED-L16-1)	15	20				(All)	(All)	true
Exit-White-Red-Surface (EXIT-LED2W-1)	18	15						✓
39 WATT LED	20	21	1		39			✓
Exit-White-Green-Wall (EXIT-LED3W-2)	30	20						✓
2x4 Parabolic Recessed Troffer (2) 14W LED T8 Lamp & High L Efficiency - 4RT215LPB	125	30	2					✓
8' Industrial with (2) 28W Lamp & HE N Ballast	125	85	2					✓
8' Industrial with (2) 12W LED T8 Lamp & HE L Ballast	135	85	2					✓
High Bay 82w LED Fixture 8,000 Lumens +12' - HB082+	230	85	1					✓
RAB 105W LED Pole Light Fixture - RWLED105	400	150	0					✓
a 2 lamp kit, white reflector and (2) 7w LED lamps - 2RF207L			2					✓
4' Strip With (2) 10W LED T8 Lamp & HE L Ballast +12' - 4ST212L+			2					✓
40w LED Canopy Fixture - CN040			0					✓
135W LED Canopy Fixture - CN135			0					✓
73 WATT LED			1					✓
72in LED Stick - 30W - SD072030			0					✓
150 WATT LED			1					✓
Replace Lamp 9.5W BR30 LED Lamp Dimtone - LP09R30WDT			1					✓
Replace Fluorescent Lamp 14W LED Refrigerated Case Light 60in Center Unit - 5CREDC			0					✓
4' Industrial with (1) 28W T8 Lamp & HE L Ballast - 4ND128L			1					✓
8' Vapor Tight With (4) 15W T8 LED Lamp & HE L Ballast +12' - 8VT415L+			4					✓
Replace Lamps and Ballast (2) 25W T8 Lamp & HE H Ballast - 4LB225H			2					✓
Decorative-LED-Clear-Suspended (LED-L40-1)								✓

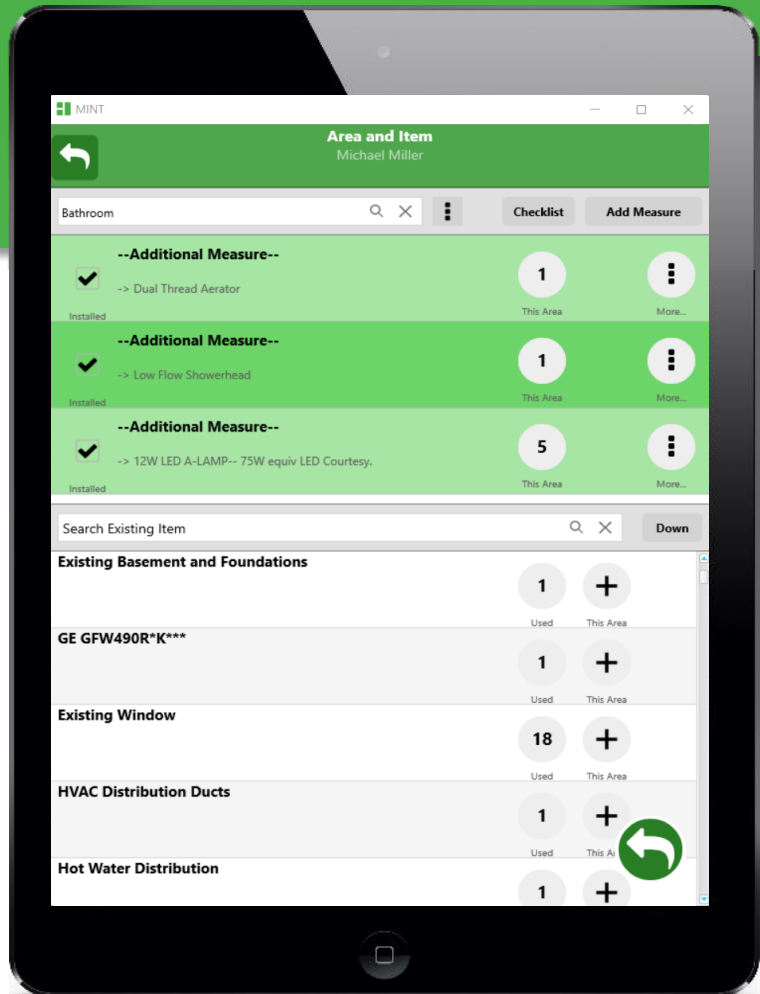
Easily Configure Measures

- ✓ Define measure defaults including codes, incentives, and specifications
- ✓ Includes material and labor costs and/or price and utility incentive amounts
- ✓ Incorporate different costs for multiple funding sources for each individual measure
- ✓ Prices defined by ECA or partner



MINT™ Guided Audit

- ✓ Offline data collection, analysis, and proposal
- ✓ Checklist of mandatory audit objects
- ✓ All fields required for valid energy analysis
- ✓ Includes health & safety measures/tests
- ✓ Prompts for signatures for releases, etc.
- ✓ Assures successful audit in one visit
- ✓ Enables lower skilled audit staff



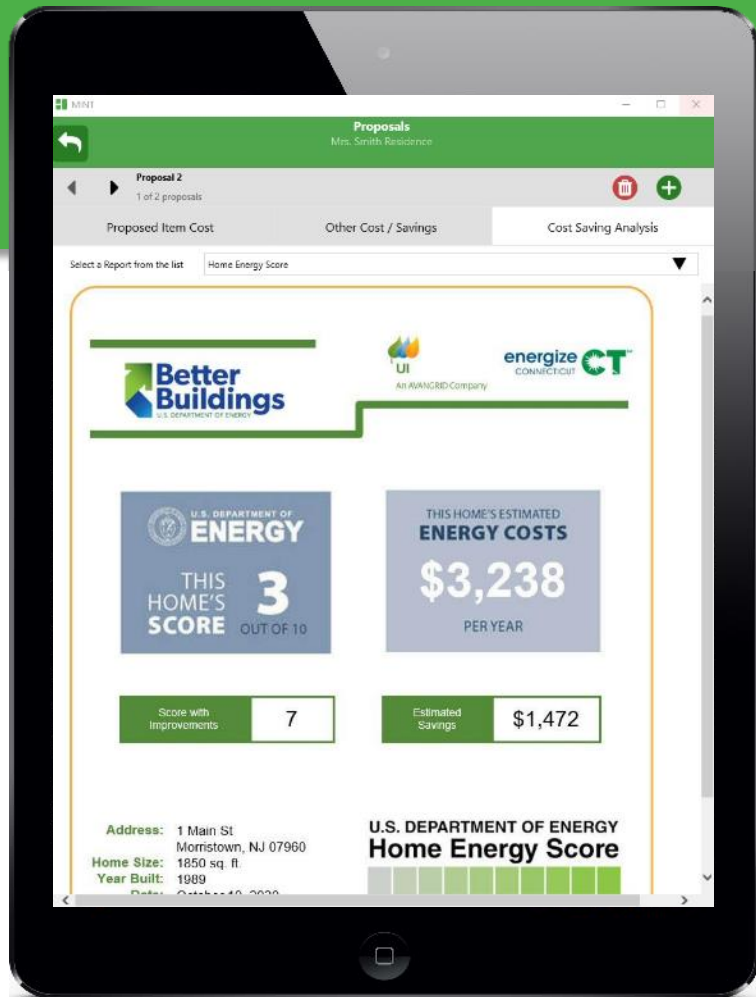
Comprehensive EE Measures

- ✓ Supports residential, small business, large commercial and industrial EE measures catalog
- ✓ Recommend replacement items
- ✓ Use on desktop or remotely while offline
- ✓ User friendly clipboard enables guided data collection
- ✓ Easily configured savings and rebate calculations



IRA Challenges

- Estimate savings with DOE Approved BPI 2400 compliant energy modeling software
- Single family home assessment to determine eligible measures and final energy savings model reflecting only completed energy improvements.
- Collects and reports the data and information required for original components and replacement measures
- Uses representative climate zone, weather, home characteristics, and actual energy usage data



Flexible Energy Modeling

- ✓ Dynamic proposal of options while offline
- ✓ DOE approved analysis of energy savings
- ✓ BPI 2400 calibrated modeling
- ✓ HOMES and HEEHR rebate measures
- ✓ Health & Safety and Readiness measures
- ✓ Also runs TRM calculations for utility programs



IRA Challenges

- Authenticated, secure collection of client signatures
- Billing release, installation contract, financing application, health & safety acknowledgements
- Claimant will be required to sign an affidavit attesting to the validity of all information provided (e.g., enrollment documents, household income, number of full-time occupant, etc.)
- Building owner signature to confirm that improvements were made at the address specified



Hancock MINT

Proposals

MARIA SONIA PANUNCIO

Proposal 1
1 of 1 proposals

Proposed Item Cost Other Cost / Savings Cost Saving Analysis

Select a Report from the list Customer Billing Release

At the end of your visit, the Vendor will provide you with a HES Comprehensive Home Energy Report outlining your home's energy usage, savings achieved during the visit, and make recommendations for upgrades. After the Vendor performs tests and installs energy-saving measures, usage data is required to make savings estimates more accurate because they reflect the usage patterns and load shapes of your home.

What information will be released?


By signing below, you will release billing data, which will be limited to the energy used in the month and the amount charged for that energy. Your payment history will not be released.

Please Check One:

I authorize the Companies to release my billing information to the assigned HES Vendor in order to evaluate potential savings resulting from proposed installed weatherization measures.

I do not authorize the release of my billing information.

Clear



Customer Signature Date: 2023-09-06

Save and Submit

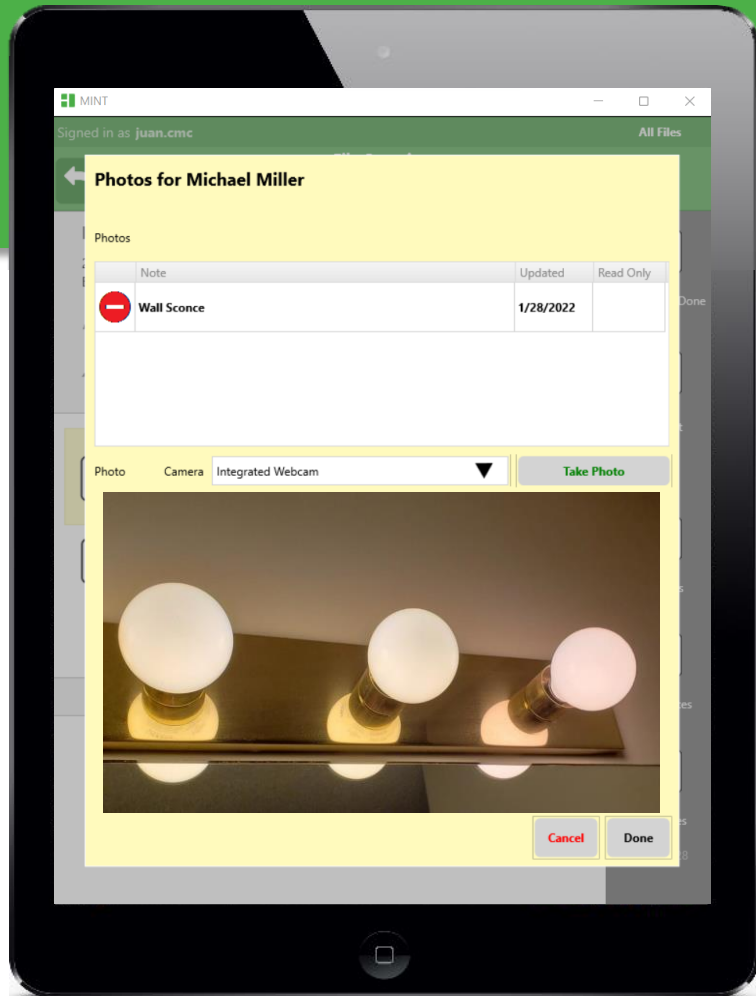
MINT™ Signatures

- ✓ Sign and save directly on tablet
- ✓ Billing release
- ✓ Contracts and work orders
- ✓ Financing applications
- ✓ Self attestations
- ✓ Automatically sync and store with household record



IRA Challenges

- Collect, organize, and store photos of original components
- Record and store images of health and safety issues in the home
- Must show proof of quality installation at designated address for all measures
- Photos should be geotagged to verify location of work completed



Photos

- ✓ Capture photos at item or job level
- ✓ Images automatically tagged with item data
- ✓ Voice input notes description
- ✓ Syncs to cloud with audit and geolocation data
- ✓ Automatically organized and securely stored
- ✓ Easily retrieved for work orders, reports, etc.

IRA Challenges

- Maintain records on QC inspections including sampling rates, findings, corrective actions taken, and verification of conformance to requirements
- Proof of quality installation at designated address
- Consumer protection functions including consumer feedback, project verification and inspections
- Reporting to measure and monitor program effectiveness

Hancock Cloud Reporting

Report

16 Reports

Search for a Report...

Sort by Name

Agency Production Report

Benefit payment amounts by utility.

Never Run

Budget Report

Budget and expenditures for both the selected date range and year-to-date.

Never Run

City Report

Counts by city for assisted clients.

Never Run

Client Report

Count by intake worker of the number of clients entered, including the allocation.

Never Run

County Production Report

Benefit payment amounts by county.

Never Run

CSBG Report

Household and individual demographic data for clients served.

Never Run

Daily Intake Report

Detailed count by intake

Never Run

DHHS Performance Measures

Federal LIHEAP performance measures report for the fiscal year.

Never Run

EARS 670 Report

LIHEAP EHA-16 REIMBURSEMENT/ACTIVITY REPORT FOR HEAP-WPO AND ECIP-WPO

Never Run

Invoice Summary Report

Invoice Summary Report

Never Run

Labor Hours Report

Hours worked and total labor cost by project and employee.

Never Run

Missing Document List

Missing Document List

Never Run

Statistical Report

Demographic information

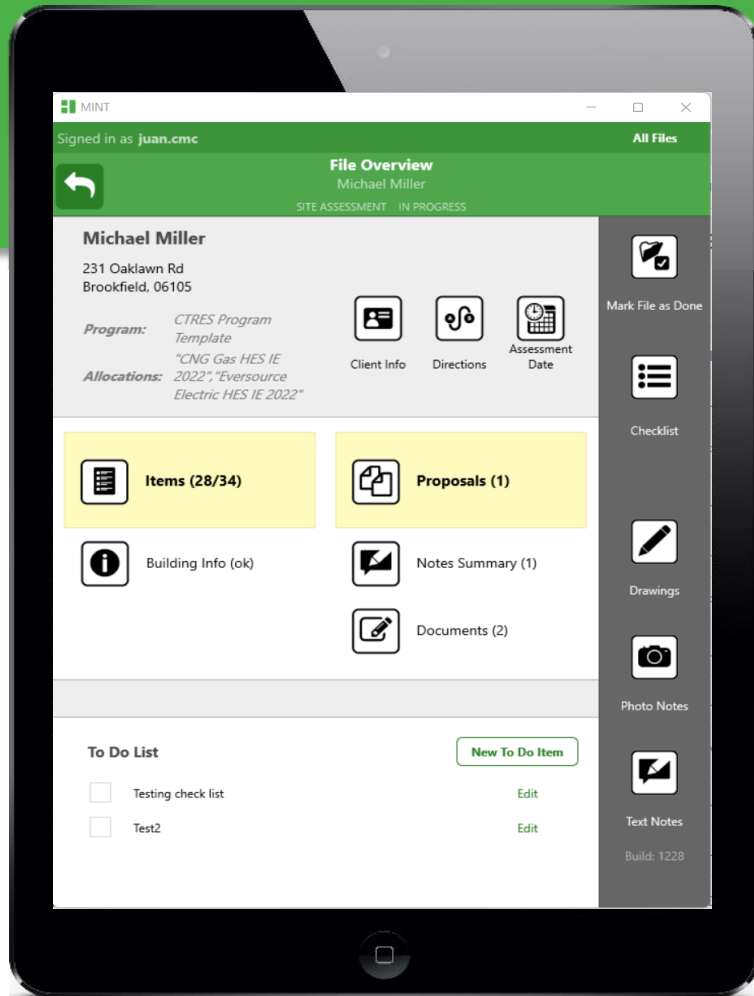
Never Run

Never Run

Quality Assurance Reporting

- ✓ Leverage canned required federal reports
- ✓ Easily configure reports for other program performance measures
- ✓ Enforces role-based visibility and security
- ✓ Create roles for program monitors to inspect program compliance and effectiveness

MINT™ Inspection Mode



Final Inspection Audit

- ✓ Guided navigation expedites field audit
- ✓ Capture and automatically organize images
- ✓ Energy Efficiency and Health & Safety measures
- ✓ Capture notes with native device microphone
- ✓ Geotagged photos to verify location of installed measures
- ✓ Client surveys for contactor scoring

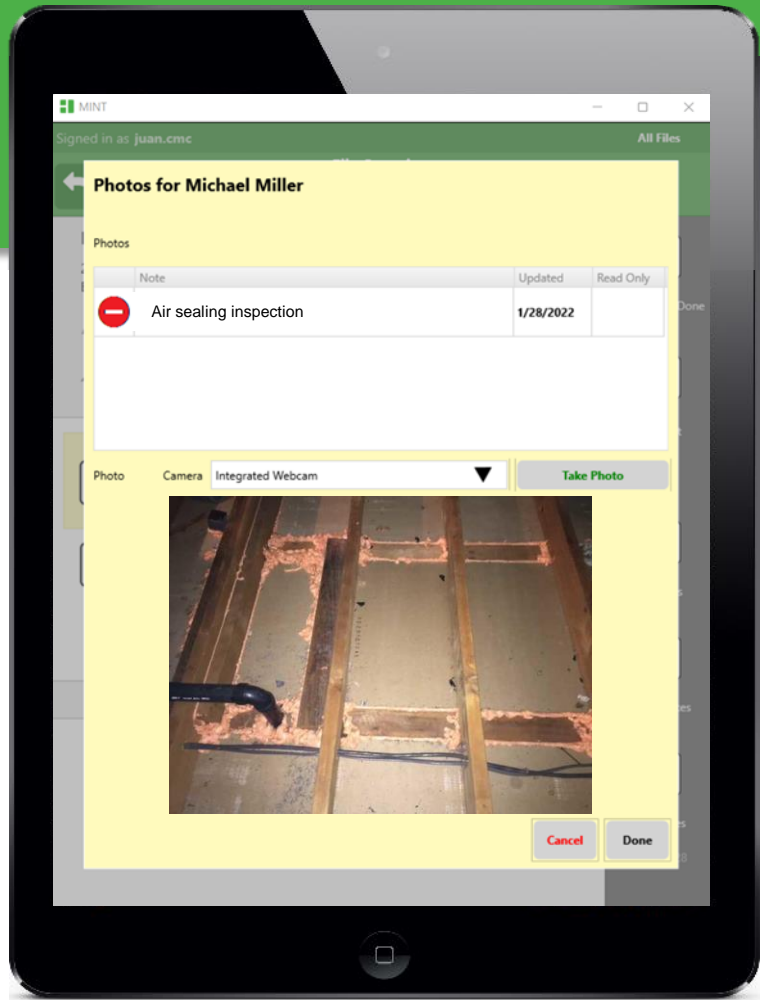
PNNL Quality Install Tool



PNNL has developed a “Quality Install Tool” in support of the home energy rebate process that aims to standardize the documentation of critical quality details across contractors and contributes to ongoing efforts aimed at standardizing installation quality across various federal, state, and municipal programs. The DOE is recommending use of this tool to assure quality installation work as an integral part of the rebate processing workflow.

MINT™ by Hancock Software in the inspection mode can be used in lieu of this tool and will replicate this documentation of critical quality details, but as an embedded integral part of the retrofit project. This eliminates the need to import/export this data to maintain a master job record. This is especially important for multifamily work where inspections may occur over multiple sessions and/or with multiple inspectors.





Inspection Mode

- ✓ Sync inspectors with same project data
- ✓ Compare installation work with original audit
- ✓ Accept or reject measures one by one
- ✓ Capture photos and notes on same project file
- ✓ Create recall workorders on rejected measures
- ✓ QCI roles for projects and programs



IRA Challenges

- Maintain an updated list of qualified contractor information
- Track performance history of each contractor (# of homes, type of buildings, energy saved, etc.)
- Maintain a record of the training, credentials, and/or qualifications required by the program for each contractor
- Notify stakeholders of expired or pending expiration of credentials

Hancock Cloud Contractor Management



Admin Allocation Application Configuration Container Measure Project Vendor **Contractor Management** More ▾

HANCOCK CLOUD™

demo.programadmin Sign Out Support

All													Filters	Clear Search	New Contractor	Export	View 20 Rows ▾
<input type="checkbox"/>	Contractor Name	Trade Type	Contractor Code	Street Number	Street Name	City	State Abbr	ZIP	Active	Customer Rating	License Number	License Date	License Expira...				
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	(All) ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="checkbox"/>	▶ <input type="checkbox"/> Crew Lead 7								✓								
<input type="checkbox"/>	▶ <input type="checkbox"/> Crew Lead 6																
<input type="checkbox"/>	▶ <input type="checkbox"/> Crew Lead 5																
<input type="checkbox"/>	▶ <input type="checkbox"/> Crew Lead 4																
<input type="checkbox"/>	▶ <input type="checkbox"/> Crew Lead 3																
<input type="checkbox"/>	▶ <input type="checkbox"/> Crew Lead 2																
<input type="checkbox"/>	▾ <input type="checkbox"/> Elysian Energy																

Users						
Login Name	Full Name	Address	ZIP	City	State	Email
demo.installer	demo.installer				MA	danielle@hancocksoftware.com

Contractor Management

- ✓ Track ongoing list of active, past, and potential program contractors
- ✓ Monitor status of individual licenses and certifications
- ✓ Maintain rating from customer feedback
- ✓ Alert stakeholders to expiring credentials

IRA Challenges

- States are *strongly encouraged* to design their rebate programs in ways that allow for effective combinations of various funding sources.
- Leverage existing programs through resource braiding, co-funding, and financing.
- Program must collect and maintain sufficient documentation to assure compliance with a variety of legal prohibitions that prevent certain methods of combining funds from different sources
- Include local utility, state, and municipal programs, HUD loans, GGRF grants, tax incentives, etc.

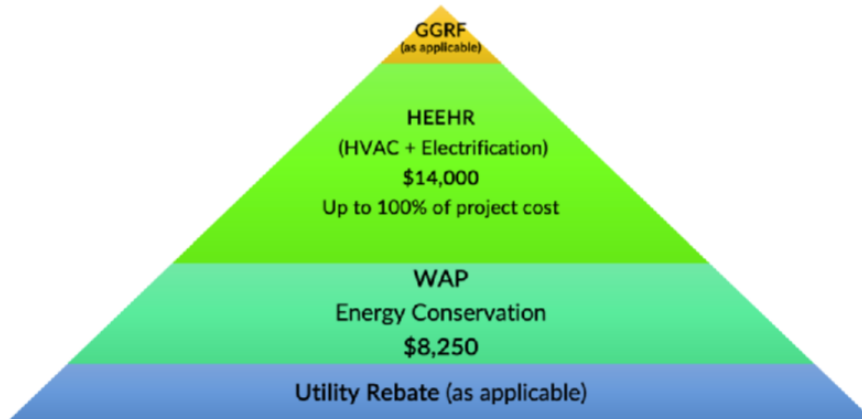
Stacking Incentives



Low-Income Households

Below 200% Poverty Line for WAP eligibility

Below 80% Area Median Income for maximum HOMES/HEEHR rebate eligibility



Moderate-Income Households

Between 80% - 150 % Area Median Income

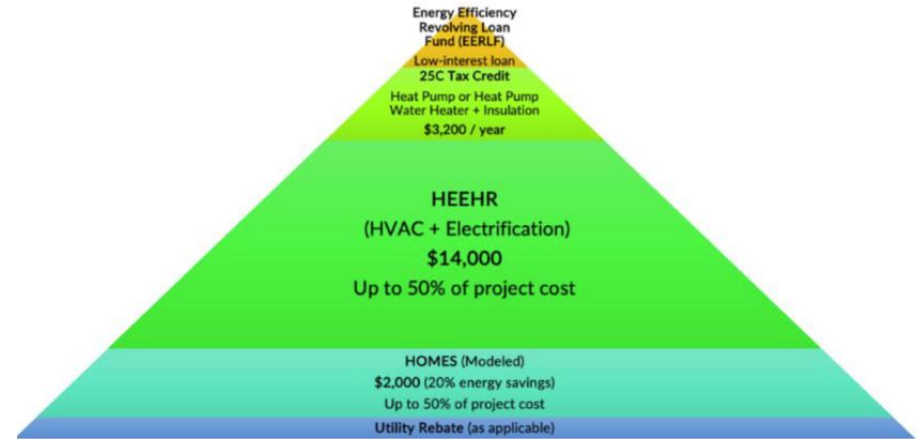


Table 1. Summary of retrofit incentives for single-family houses and multifamily buildings in recent federal legislation

Program	Funding	How distributed?	When?	Who is eligible?	What is eligible?	For how much?
HOMES Rebate (DOE)	\$4.3 billion and \$0.2 billion for training	Rebates via SEOs	After DOE guidance and state plans	Homeowners and landlords, all income levels (or aggregators)	Whole-home retrofit projects that reduce energy use at least 15%	Typically \$2,000 to \$4,000, doubled for households below 80% of AMI
High-Efficiency Electric Home Rebate (DOE)	\$4.5 billion (includes \$0.225 billion for tribes)	Rebates via SEOs and tribes (may be point of sale)	After DOE guidance and state plans	Residents, building owners, or contractors, for households below 150% of AMI	Electrical equipment and insulation. For new construction, to replace non-electric, or first-time purchase.	50% of project cost (100% for households below 80% of AMI) up to \$14,000 total with subcaps
WAP (DOE)	\$3.5 billion in IJJA	Direct install via WAP agencies	50% when state plans approved	Homeowners and landlords, generally household income under 200% of FPL	Whole-home retrofit projects	Typically cost up to about \$8,000 per home
25C tax credit	\$12.5 billion CBO "score" through 2031	Via tax returns	2023–2032 (under old rules in 2022)	Homeowners (for their principal residence)	Efficient equipment and components, energy audits.	30% of cost up to \$1,200/year (\$2,000 for heat pumps and wood stoves), with subcaps
179D tax deduction (retrofit portion)	No separate estimate	Via tax returns	2023–2032 (under old rules in 2022)	Owners of multifamily buildings over three stories (nonprofits and governments may transfer the deduction)	Retrofit projects that reduce building energy use at least 25%	\$0.50–5 per sq. ft. of floor area based on energy savings and labor standards
Energy efficiency in affordable housing (HUD)	\$1 billion	Grants or loans and technical assist	After HUD request for proposals to 2028	Owners of HUD-assisted affordable housing	Measures to improve energy and water efficiency, air quality, and resilience and energy benchmarking	TBD
Greenhouse Gas Reduction Fund (EPA)	\$27 billion (total—portion for housing unknown)	Grants, loans, other financial assistance, and technical assist	To distributing orgs. 2022–2024	Unspecified, but much of it for low-income and disadvantaged communities; distributed via states, tribes, cities, and nonprofit orgs.	Zero emission technologies and projects to reduce or avoid GHG emissions and other forms of air pollution	TBD

Multiple Funding Sources



One of the single most significant benefits of Hancock Cloud for energy efficiency program management is the ability to automatically manage multiple funding sources for a given retrofit project simultaneously.

During the application process a home or building leverages a fully configured rules engine to qualify eligibility for any number of funding sources each with their own unique qualification rules. Then during implementation, only eligible funding sources will be applied for each measure, or even combined funding for a single measure where permitted, while ensuring that prohibitions of shared funding by certain programs are enforced. For example, a DOE WAP qualified home might not meet the DOE SIR requirements for a heat pump water heater alone, but when partially funded by a local utility heat pump rebate, the measure is now eligible under DOE rules as well providing deeper savings.



Hancock Cloud Allocation Setup



Search

Allocation Name
Unitil Electric HEA Income Eligible 2022
Unitil Electric HEA 2022
NGRID Electric HEA Income Eligible 2022
NGRID Electric HEA 2022
Liberty Gas HEA Income Eligible 2022
Liberty Gas HEA 2022
Eversource Gas HEA Income Eligible 2022
Eversource Gas HEA 2022
Berkshire Gas Gas HEA Income Eligible 2022
Berkshire Gas Gas HEA 2022

Allocation

Allocation Name *	Allocated Amount *
NGRID Electric HEA 2022	50000000.00
Agency *	Federal Fiscal Year
Clearesult	2022
Start Date *	End Date *
1/1/2022	12/31/2022
Funding Source	Participant Goal
	0.00
Program Code	Allocation Type
none	Weatherization
No Service Budget Limit <input checked="" type="checkbox"/>	Active <input checked="" type="checkbox"/> Supplemental <input type="checkbox"/>
Weatherization	
Savings Goal	
50000.00	
Allocation Rule(Single Family)	Allocation Rule(Multi-Family)
Allocation Rule Set	

All Filters Clear Search New

Allocation Name	Start Date	Allocated Amount	Undistributed Balance	Active		
Unitil Electric HEA Income Eligible 2022				✓		
Unitil Electric HEA 2022				✓		
NGRID Electric HEA Income Eligible 2022				✓		
NGRID Electric HEA 2022				✓		
Liberty Gas HEA Income Eligible 2022				✓		
Liberty Gas HEA 2022				✓		
Eversource Gas HEA Income Eligible 2022				✓		
Eversource Gas HEA 2022				✓		
Berkshire Gas Gas HEA Income Eligible 2022				✓		
Berkshire Gas Gas HEA 2022				✓		
	2026	\$30,000,000.00	\$29,900,000.00	✓		
	Weatherization	01/01/2022	12/31/2026	\$50,000,000.00	\$49,900,000.00	✓

Funding Allocations

- ✓ Define multiple programs
- ✓ Many programs for one organization or allocate to multiple organizations
- ✓ Assign budgets and program goals
- ✓ Track project status and changes in real-time
- ✓ Different rules for different programs enforced simultaneously

Multiple Funding Source Qualification Rules



Lookup Tables Client Letters / Label

EOC WAP Lookup Rule Set

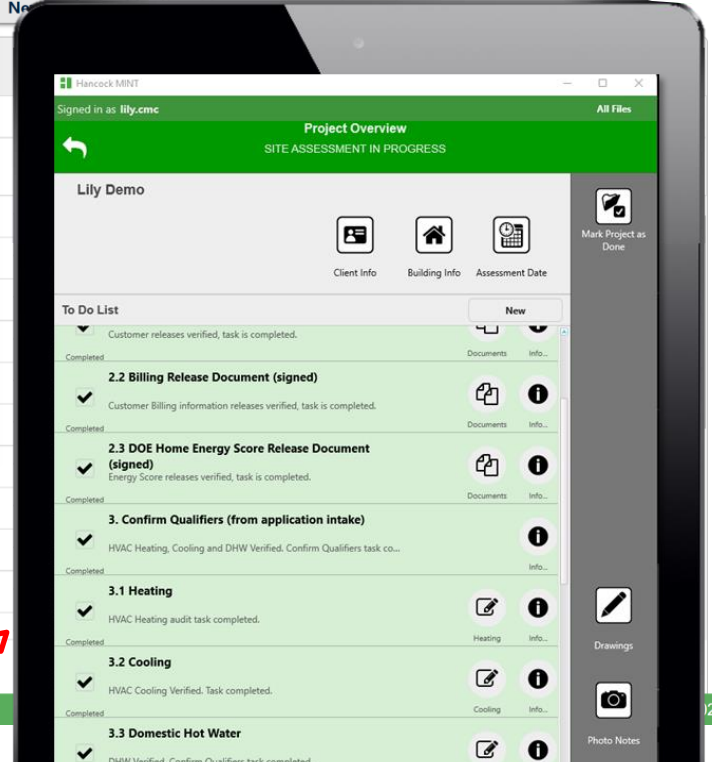
FederalPovertyLevel

FederalPovertyLevel

FPL Id

FPL Id			
116			
117			
118			
119			
120			
121			
122			
123	8	1/1/2020	
124	9	1/1/2020	
125	10	1/1/2020	
126	11	1/1/2020	

- InvoiceStatus
- Language
- LEAPStatus
- MaritalStatus
- MedicalInsurance
- MilitaryStatus
- Month
- MonthSeasonRelationship
- MonthType
- MultiFamilyUnitType
- OtherHeatingCharges



DOE WAP Braiding



By definition, households qualifying for Weatherization Assistance Program are also entitled to HEEHR incentives. The proposed budget allocation excludes these single family homes identified by the WAP from further support from the IRA Home Energy Rebates. By allocating 85% of HEEHR program funding into the M-RISE program for multi-family buildings and the remaining 15% for Comfort Partners, BPU may miss opportunities to maximize energy savings and emissions reductions for these disadvantaged households, which is after all the primary objective of this IRA legislation.

BPU should work with the Department of Community Affairs to braid Weatherization Assistance Program (WAP) funding with the Home Energy Rebates to ensure there is maximal coverage and assist DCA sub-grantees in ensuring that there no overlap between the energy measures used for the programs.



IRA Challenges

- Complex application process qualifying buildings with partial non LMI occupancy and multiple tiers of benefits based on an AMI that varies from area to area.
- Coordinating activities of multiple contractors and multiple inspections on large energy efficiency retrofit projects that span months or years when compared with single family homes
- Extensive assessment requirements to model whole building energy savings and identify best potential energy efficiency measures for both measured and modeled pathways
- Aggregating energy consumption and allocating split benefits between owners and tenants

Hancock Cloud for Multifamily



Hancock Cloud includes a number of features specifically aimed at the challenges of programs that manage large multifamily energy efficiency projects:

- Choice of individual unit applications that are merged into one or a single central application completed by a building manager
- Automatically aggregates and tracks income status for the whole building to ensure multiple varying AMI thresholds are met for 50% of the units
- Assessments by multiple assessors and multiple visits are synced automatically into one project record
- Installation/inspection progress, status, and issues on retrofits that go on for months or years are synced and tracked in single project record
- Collection of data to support Davis-Bacon Act compliance reporting for braiding with non-IRA funding sources



Multifamily Energy Efficiency Projects



Admin Allocation **Application** Configuration Container Invoice Measure More ▾

HANCOCK CLOUD™ support

Application - Moreno Apartments 74133-13-059 - Job Created

More ▾ New Application Client Letter More ▾ - □ ×

Moreno Apartments [04/19/2021] ✕

Application Info Application Qualification History

Cancel Save Save Settings Unit Info

Property Ownership: Organization has long term lease

Long Term Lease: Description of Terms

Organization Status*
501(c)3
501(c)3
Housing Authority
For-Profit
Other

Property
Consumption
Document

Document	Document Status	Comment	Revised Date	Attached File Name	Download Form
<input type="checkbox"/> Housing Provider signed affidavit of ...	Complete		4/19/2021	AffidavitofIncomeDocumentation.pdf	
<input type="checkbox"/> Utility Bill- Gas (1 year required)	Complete		4/19/2021	utility_bills_moreno.pdf	

Multifamily Energy Efficiency Projects



Admin Allocation Application Configuration Container Invoice **Project** More ▾

Support Hancock Cloud

Grid View ▾

Process All 2 Records

[Invoice](#) [Validate](#) [Delete](#) [Save Profile](#) All ▾ [Filters](#) [Clear Search](#) [Export](#) View 20 Rows ▾

<input type="checkbox"/>	Client Name	Primary Property Contact Name	Project Number	Address	Allocation(s) ↑	Assessment Date	Order Date	Purchase Date	Install Finish
<input type="checkbox"/>	Brick Apartments		0000000879	343 Hope St, Colorado Springs, CO 80443	Black Hills Electric MF (650), CEO LEAP (515) 2022, DOE (510) 2022	7/12/2021			
<input type="checkbox"/>	Moreno Apartments 74133-13-059	Lee Patke	0000000934	1030 W. Moreno Ave, Colorado Springs, CO 80905	Black Hills Electric MF (650), CEO LEAP (515) 2022, DOE (510) 2022				

▶ **Project Info** [Client Info](#) [Building Info](#)

▶ **Schedule**

▶ **Measure Management**

▶ **Project Invoice List**

Partners Welcome



Hancock Software does not design or manage energy efficiency programs. We have a highly flexible, easily configured platform that can be readily adapted to all manner of energy service programs. As often as not, our solution is deployed on a program in partnership with a program administrator, rather than with the utility directly.

There is no one “best” way to distribute IRA home energy efficiency rebate funding and there will be a broad spectrum of program solutions represented across participating states. We are confident that Hancock Cloud will meet the requirements of these widely varied programs right out of the box. So, instead of trying to build a one-off solution from scratch, we invite all program designers, program administrators, and aggregators to contact us directly and explore how Hancock Software solutions might benefit your plans for an IRA HOMES & HEEHR Rebate Program.





Contact: kevin@hancocksoftware.com
www.hancocksoftware.com

