



Empowering you to make  
smart energy choices

# Energize Connecticut Upstream Residential HVAC and Water Heating Program

Jennifer Parsons – United Illuminating, Southern Connecticut Gas,  
and Connecticut Natural Gas

EVERSOURCE  
ENERGY



UIL HOLDINGS COMPANIES

# Presentation Agenda

---

- Energize Connecticut
- Upstream Model and Benefits
- Upstream Water Heater Program
  - Distributor requirements
  - Marketing
  - Success
  - Challenges
  - Program Considerations

# Energize Connecticut

---

- Energize Connecticut is an initiative to help consumers save money and use clean, affordable energy.
- A partnership of the Energy Efficiency Fund, the Connecticut Green Bank, Department of Energy and Environmental Protection (DEEP), and the local electric and gas utilities.
- Efficiency incentive programs funded through the CT Energy Efficiency Fund.
  - Created in 1998 with natural gas programs added in 2005



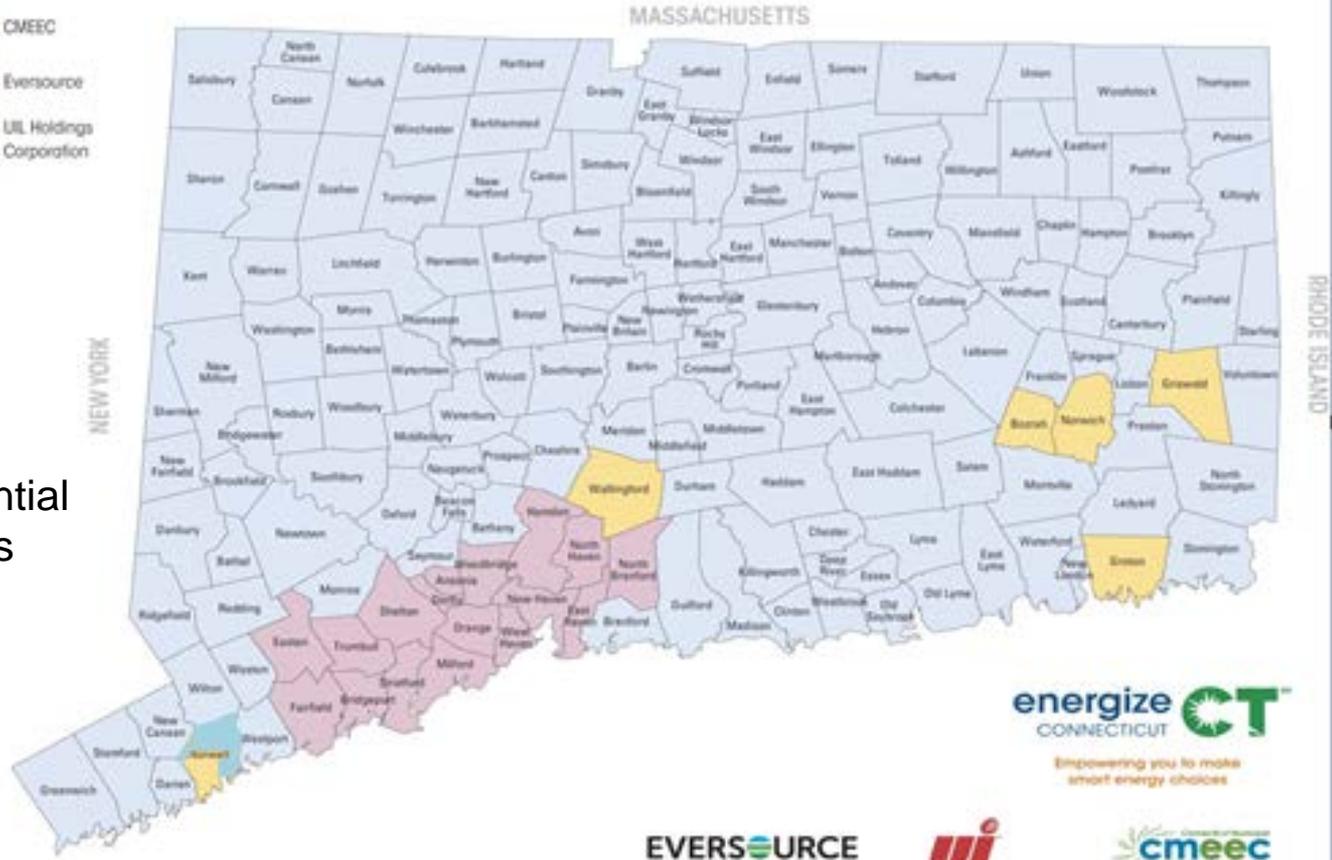


# CT Service Territory: Electric

1,325,000 Residential Electric Customers

## Electric Service Areas

- CMEEC
- Eversource
- UIL Holdings Corporation



**energize CT**  
CONNECTICUT

Empowering you to make smart energy choices

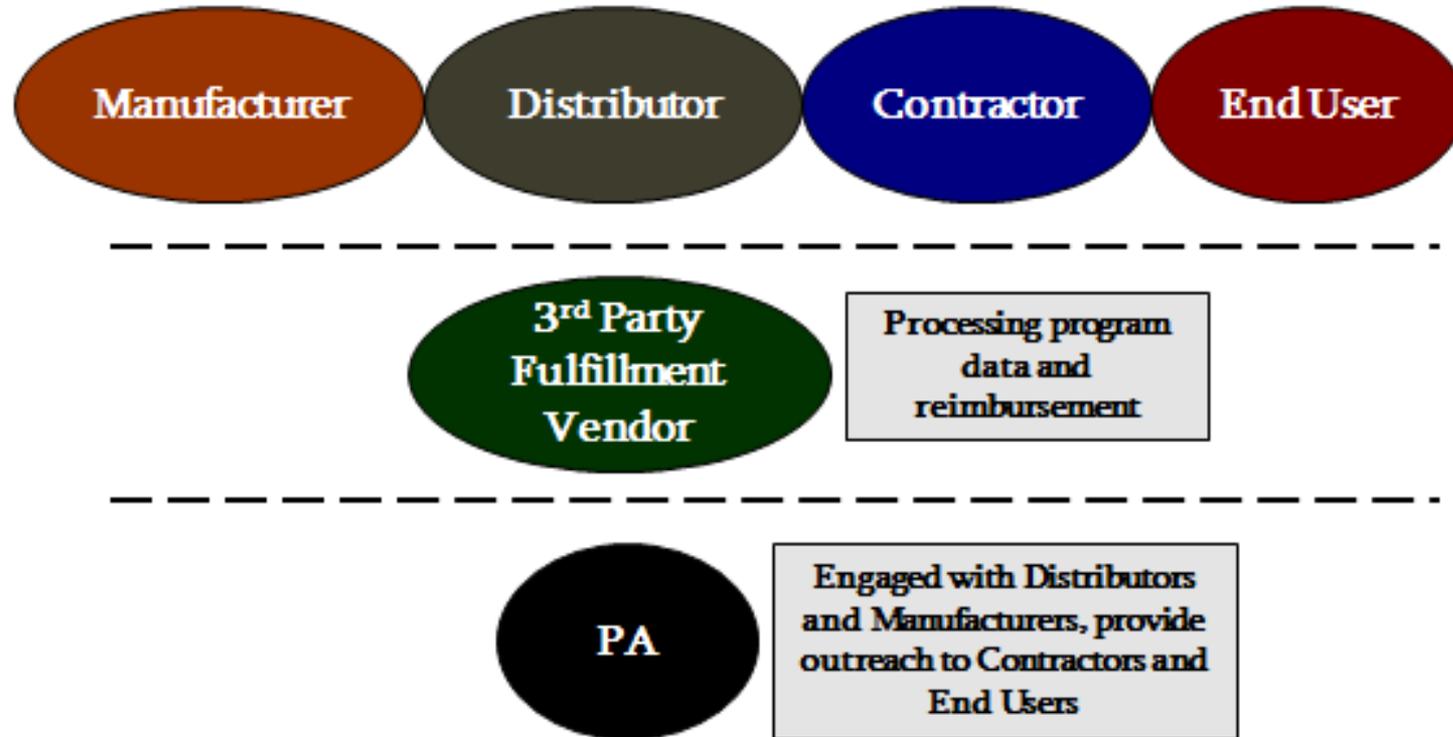
**EVERSOURCE**  
ENERGY

**ui**

**cmeec**  
COMMERCIAL ENERGY SERVICES

**energize CT**  
CONNECTICUT

# What is Upstream?

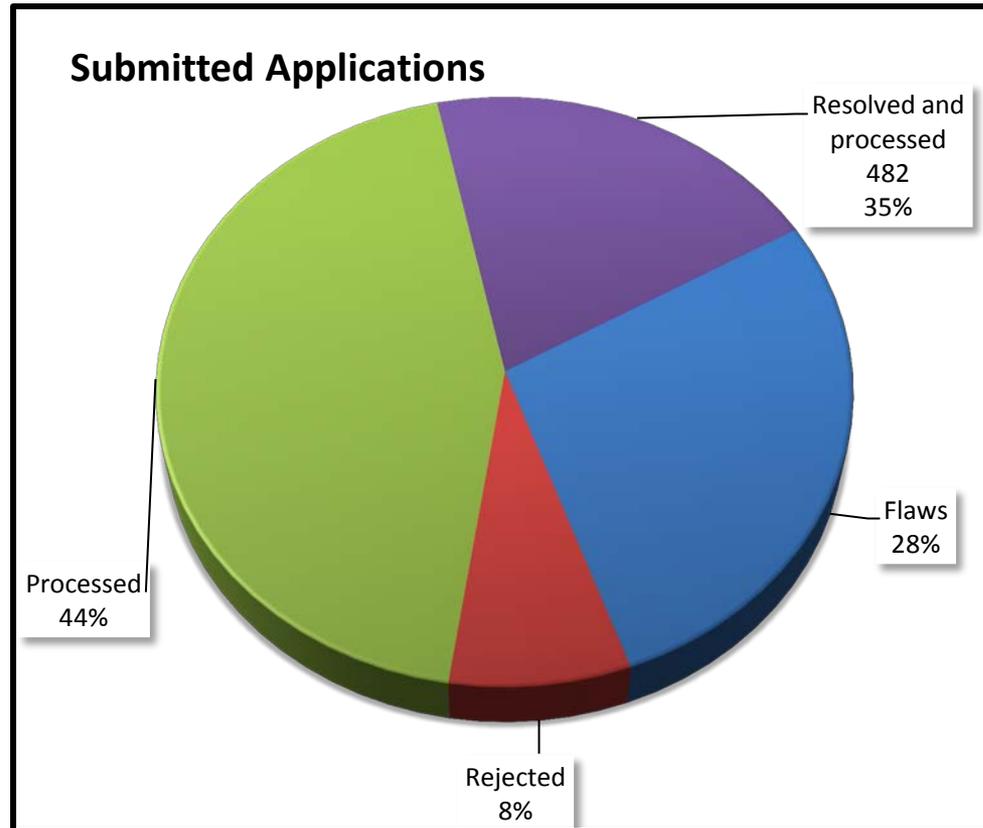


# Why Move Upstream?

---

- Rebate breakage
- Incomplete submissions
- Low distributor and contractor program understanding
- Desire for market transformation
- Increased high efficiency equipment stocking

# Gas & Electric Water Heating Flaw Breakdown - 2013



# Benefits of Upstream Programs

Stakeholder	Benefits
<b>Manufacturer</b>	<ul style="list-style-type: none"><li>• Opportunity to balance product mix</li><li>• Push latest technology to market</li></ul>
<b>Distributor</b>	<ul style="list-style-type: none"><li>• Increased profits and market share</li><li>• Opportunity to transform end market</li></ul>
<b>Contractor</b>	<ul style="list-style-type: none"><li>• Lower first cost</li><li>• No rebate completion required</li><li>• Sales and marketing tool to sell jobs</li></ul>
<b>End-users</b>	<ul style="list-style-type: none"><li>• No rebate processing (time and money)</li><li>• Lower first cost</li><li>• Energy and lifetime cost savings</li></ul>
<b>Utility</b>	<ul style="list-style-type: none"><li>• Eliminate loss of savings associated with forms</li><li>• Opportunity to reach larger customer base</li></ul>

# Residential Upstream Incentives

---

## Eligible Equipment

- ENERGY STAR® Natural Gas Water Heaters:
  - Tankless 0.94 EF+ = \$300
  - Condensing 95% TE = \$300
- ENERGY STAR Heat Pump Water Heaters: \$400 or \$300 instant + \$100 mail-in at retailers that won't share customer data
- ENERGY STAR Natural Gas Boilers @ 90% AFUE = \$750
- ENERGY STAR Natural Gas Furnaces = \$600, Oil & Propane = \$200
- Boiler Circulator Pumps = \$100

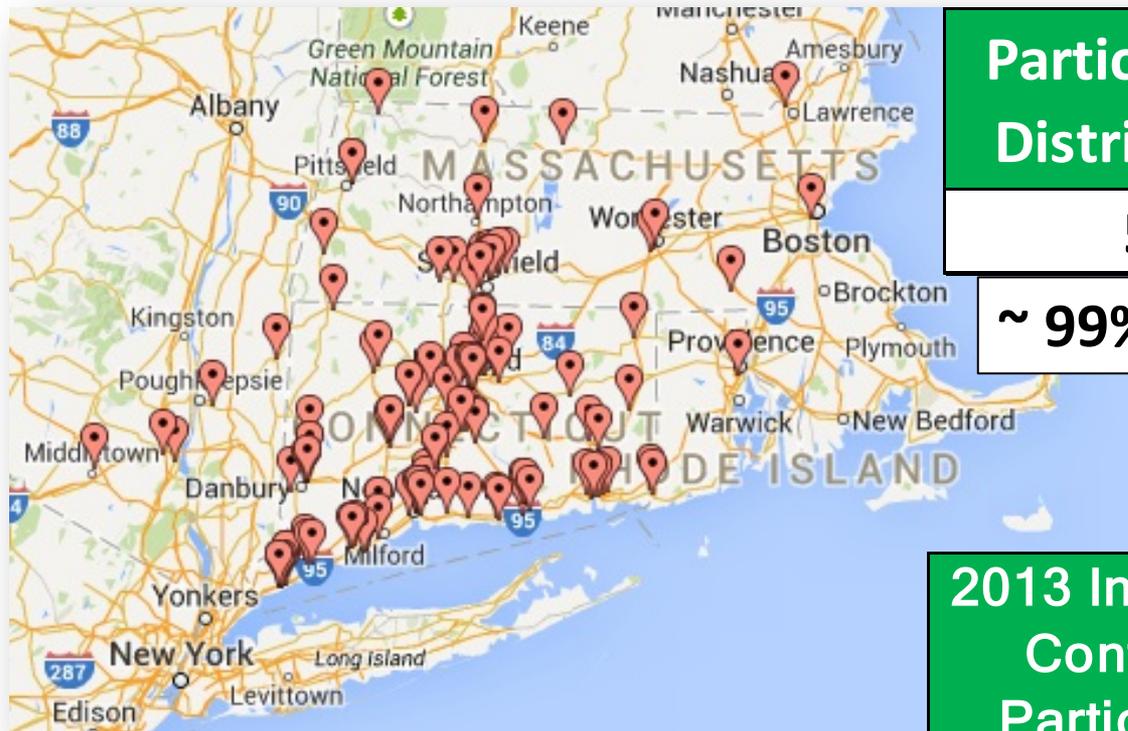


Empowering you to make  
smart energy choices

# Moving Upstream

# Distributor and Installer Enrollment Success

- Program Pilot began October 2013
- Statewide Rollout April 2014



**Participating  
Distributors**

**52**

**Participating  
Branch Locations**

**139**

**~ 99% distributor participation**

**2013 Installation  
Contractor  
Participation**

**176**

**2014 Installation  
Contractor  
Participation**

**481**



# Distributor Participation Requirement

---

- Sign agreement
- Mark down eligible equipment when sold in participating towns – Qualified Products List (QPL) models only
- Licensed installers only
- Collect end user information
- Send submission template and invoices to rebate fulfillment vendor – online submission portal OR email
- Reimbursed for mark down plus \$15 processing fee within 30 days

# Bulk Purchasing Procedure

---

- Contractors must purchase equipment in bulk at **full retail price**
- Distributor issues a credit to contractor **once the contractor tells the distributor where the equipment was installed**
  - This requires **ACCURATE residential customer's name and address**

# Data Submission

---

- Send fully completed excel template and accompanying invoices via email or the online submission portal
- Can submit weekly, biweekly, or monthly. But must submit at least one time per month
- Rebate Fulfillment vendor will send checks to distributor no more than twice per month

# Data Submission Fields

---

- Distributor ID
- Retail Price (optional)
- Buydown Incentive Amount
- Invoice/PO #
- Customer Installation Name
- Customer Installation Address
- Customer Installation City
- Customer Installation State
- Customer Installation ZIP
- Purchaser/Contractor Contact Name
- Purchaser/Contractor Contact Address
- Purchaser/Contractor Contact City
- Purchaser/Contractor Contact Zip
- Purchaser/Contractor Contact Phone
- Purchaser/Contractor Contact Email (optional)
- Sales Date
- Distributor Model #
- Measure Type
- QPL Model Number
- Manufacturer
- Fuel Type
- Quantity
- Comments (Optional)

# Online Submission Portal!

---

- Fulfillment Vendor created the online submission portal
- The submission portal will be placed on the Companies' websites
- This portal will also house the most up-to-date versions of the **Qualifying Product Lists**
- All distributors are emailed a unique login ID and Password
- This doesn't replace the email method of submission, but gives distributors a way to track the payment status of submissions

# Online Submission Portal



Empowering you to make smart energy choices



UIL HOLDINGS COMPANIES

[Need help?](#)

## PROGRAM INFORMATION

Thank you for participating in the Energize CT Upstream Residential Space and Water Heating Equipment Distributor Initiative. Please click on the link below to upload your submission.

For a list of qualifying products click [here](#).

A blank copy of the Excel® spreadsheet may be downloaded [here](#) (right-click and choose "save link as")

## APPLY FOR UPSTREAM PROGRAM REIMBURSEMENT



Upload Incentive Application Spreadsheet

## FIND REIMBURSEMENT STATUS



For a status on an existing submission please choose one of the following:

To receive an email with a link to a status page:

Enter Your Email Address

If you know the submission number and mailing Zip code, you can look up its status here:

Enter Your Submission # Mail Zipcode

Please bookmark this page in order to check your submission status at any point in the future.

powered by |



Empowering you to make smart energy choices



UIL HOLDINGS COMPANIES

[Need help?](#)

## SUBMISSION METHOD

You are submitting this form and supporting documents **online**

## INDUSTRY PARTNER INFORMATION

Partner Name:	<input type="text" value="Please Select ..."/>	
Authentication:	<input type="text"/>	Please enter the authentication code you were assigned. If you don't have your code, please contact the EFI Program Coordinator at (800) 876-0660 x4514.
Name:	<input type="text"/>	
Email Address:	<input type="text"/>	
Street Address:	<input type="text"/>	
Mailing Address:	<input type="text"/>	

## SUPPORTING DOCUMENTS

Upload File	<input type="button" value="Browse..."/>	Please attach the completed Excel® file (from template) with the rebate details, along with any required supporting documentation. Digital images (JPG/GIF/PNG/TIF/BMP format) or DOC/DOCX/PDF's of the required documents are accepted. Individual files must be smaller than 3 megabytes. Just click the Browse button and select the files, one at a time, to upload.
-------------	------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

I agree to the [Terms & Conditions](#) set forth by Eversource/United Illuminating & Energy Federation Inc., and I understand and intend that checking the box be accepted and have the same force and effect as an original signature.

I certify that the name typed in the box below is my name, and that I am the person accessing this Web page and submitting the online application.

By checking the Terms and Conditions acceptance and typing my name below, I certify that all information on this application is true and correct to the best of my knowledge, and that I understand and agree to the program and site-use terms and conditions. I also agree that the Terms and Conditions check box and my name typed below are to be used as my electronic signature.

Typed Signature:

powered by |

# Online Submission Portal



Empowering you to make smart energy choices



UIL HOLDINGS COMPANIES

Mail  
 Energize CT  
 40 Washington St., Suite 2000  
 Westborough, MA 01581

For more information:  
 EFI Program Coordinator  
 (800) 876-0660 x4514

Submission #1618053 submitted on 04/17/2015

Total Reimbursement Amount: \$TBD

#### Line Items

Application Summary	Status	Applied Qty	Applied \$	Paid Qty	Paid \$
CT/UI Distributor Incentive Program	eSubmit	TBD	TBD	TBD	TBD

#### Status Definitions

eSubmit indicates that your electronic application has been received. If you uploaded your supporting documentation as part of the application, your application is complete. If you elected to submit your supporting documentation via email reply, you should have received an email shortly after submitting your online application. You will need to reply to that email and attach your documentation to the reply. If you chose to print and mail your application along with your supporting documentation, please refer to the checklist that printed along with your application for detailed instructions on what to do next.

powered by | efi

Subject: Your Submission Has Been Received



Empowering you to make smart energy choices



UIL HOLDINGS COMPANIES

### Your electronic submission has been received

Hello Energy Federation, Inc.,

Your electronic application with the Energize CT Upstream Residential Space and Water Heating Equipment Distributor Initiative has been received. No further action is required at this time. We will notify you if we have any questions after reviewing your submission.

Submission No.: 1618053

You may check on the status of your submission at any time by clicking [here](#).

If your submission qualifies, we will mail the appropriate reimbursement in approximately 6-8 weeks of our receipt of the supporting materials.

If you have any questions regarding your submission, please do not hesitate to contact our EFI Program Coordinator at (800) 876-0660 x4514. We are open from 8 AM to 8 PM, Monday through Friday, and 8 AM to 5 PM on Saturdays.

Thank You,

EnergizeCT

powered by | efi

# Qualifying Products Listing

---

- Maintained by Program Administrators
- Distributors/Manufacturers can add to it

# Marketing

- Point of Purchase (POP) Signage, Radio, and Billboards



**ENERGY STAR® Natural Gas Water Heater**

**BIG SAVINGS NATURALLY!**

**INSTANT DISCOUNT \$100-\$500**

PRICE OF PARTICIPATING MODELS REFLECTS ENERGIZE CONNECTICUT INSTANT DISCOUNT\*

\*Must provide a valid residential CHES, SCG, or Eversource customer installation address.

**ASK OUR SALES AND SERVICE TEAM FOR DETAILS.**

For more information call 1-877 WISE USE (877-947-3873) Or visit [EnergizeCT.com](http://EnergizeCT.com)

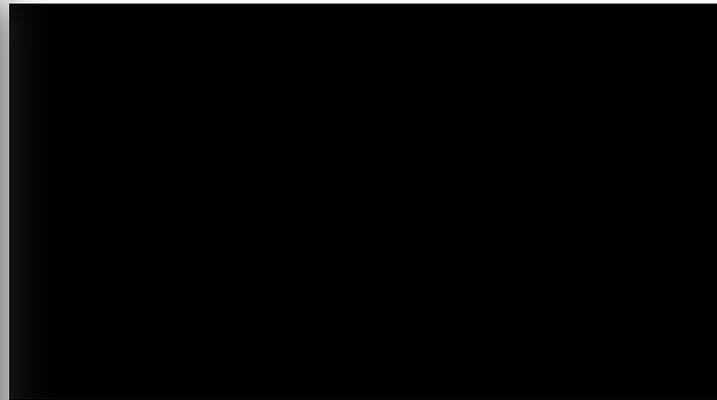
SPECIAL PRICING BROUGHT TO YOU BY

**energize CT** CONNECTICUT  
Empowering you to make smart energy choices

**EVERSOURCE ENERGY** **ui** **CG** **CS&G**

© 2014 ENERGY STAR®

Energize Connecticut helps you save money and use clean energy. It is an initiative of the Energy Efficiency Fund, the Connecticut Green Bank, the State, and your local electric and gas utilities with funding from a charge on customer energy bills.



**Heat Pump Water Heaters use 50% LESS ENERGY**

Than standard electric water heaters!

**energize CT** **CONNECTICUT** **Empowering you to make smart energy choices** **Connecticut Light & Power** **ui** **The United Illuminating Company**

**1-877-WISE USE** **EnergizeCT.com**



# Gas Water Heating: on TV

<https://vimeo.com/channels/719455/93668883>



# Targeted Direct Mailer: Partnership with GE

**SAVE HUNDREDS WITH REBATES FROM PARTICIPATING RETAILERS AND YOUR LOCAL ELECTRIC UTILITY.**

\*\*\*\*\*ECRWSEDDM\*\*\*\*\*  
LOCAL  
POSTAL CUSTOMER

PRSRT STD  
US POSTAGE  
PAID  
LOUISVILLE, KY  
PERMIT # 643

AVAILABLE AT



*Limited-time offer  
good until October 31, 2015*

*Don't flood your basement!  
If your water heater is over 10 years old,  
be proactive and replace it with an  
ENERGY STAR® certified water heater  
BEFORE it fails.*

GE® GeoSpring™	50-gal	80-gal
Regular Price:	\$1,199	\$1,899
GE instant discount:	\$200	\$200
Energize CT instant discount:***	\$400	\$400
Final Price:	\$599	\$1,299



**GE APPLIANCES**

PARTICIPATING UTILITY



Empowering you to make  
smart energy choices

\*\*\*Energize Connecticut instant discount is available to residential customers of Eversource and The United Illuminating Company.

Utilities recommend unit installed in unconditioned space except garages and closets for optimum energy savings. For more information visit [EnergizeCT.com/HeatPump-WaterHeater](http://EnergizeCT.com/HeatPump-WaterHeater).

LOWE'S®, Gable Mansard Design, and Never Stop Improving are registered trademarks of LF, LLC. All are used with permission. Lowe's® shall not be responsible for the fulfillment of the electric utility rebate.

Energize Connecticut programs funded by a charge on customer energy bills

To learn more, visit [GeoSpring.com](http://GeoSpring.com) or [EnergizeCT.com/HeatPumpWaterHeater](http://EnergizeCT.com/HeatPumpWaterHeater)



# Email to Contractor Database

- 2,000 HVAC/plumber recipients



## Heat Pump Water Heaters can save your customers THOUSANDS!

The latest **ENERGY STAR®** Heat Pump Water Heaters use [less than half the energy](#) of a conventional electric water heater. And that means a typical household can [save thousands](#) over the life of the unit.

And the savings don't end there! You can also offer your customers an [instant \\$400 discount](#) on select ENERGY STAR® Heat Pump Water Heaters. That's in addition to other manufacturer rebates which may be available.

Energy and money savings for homeowners. And happy customers for you. It's a win-win!

Go to [EnergizeCT.com](http://EnergizeCT.com) or call **1-877-WISE USE** to learn more.

### Email Copy, Message 2

Head: **Heat Pump Water Heaters.  
Good for your customers.  
Good for your business.**

Copy: **Want to attract new customers? ENERGY STAR® is the answer!**

The latest **ENERGY STAR®** Heat Pump Water Heaters use [less than half the energy](#) of a conventional electric water heater, [saving thousands](#) over the life of the unit.

What's more, water heaters over 10 years old are increasingly prone to failure.

With an [instant \\$400 discount](#) on select ENERGY STAR® Heat Pump Water Heaters – along with other manufacturer rebates which may be available – you can help your customers avoid a big problem today *and* save money for years to come!

Happy customers – what could be better? Go to [EnergizeCT.com](http://EnergizeCT.com) or call **1-877-WISE USE** to learn more.

Logos: **Energize CT / Eversource / UI / ENERGY STAR®**



Empowering you to make smart energy choices



# Web Banner Ads



Empowering you to make smart energy choices



Heat Pump  
Water Heaters use  
**50%  
LESS ENERGY**  
Than Traditional  
Electric Water Heaters!



Find Out More!



Heat Pump  
Water Heaters  
Use...



A UAL HOLDINGS COMPANY



**50% Less  
Energy**  
Than Standard  
Electric Tanks!



A UAL HOLDINGS COMPANY



Replace  
Yours  
Before it fails!



Find Out  
More!

# Quality Assurance

- Rebate vendor verifying against double-dipping (during rebate transition period)
- Circuit Rider
- Gas territory placemats
- Post inspections + telephone surveys
- Customer “thank you” postcard:



Did you know that heating, cooling and hot water account for more than half of the energy used in your home?

Your new energy-efficient equipment is helping you cut back on utility costs while making your home more comfortable. Plus, you saved instantly through Energize Connecticut!

When your installation contractor purchased the equipment, an Energize Connecticut rebate was applied. You saved between \$100 and \$750 without filling out a rebate form!

If you have questions regarding your equipment, please contact the installing contractor.

For more ways to save and for details on the instant rebate applied, visit [EnergizeCT.com](http://EnergizeCT.com)

Customer Address  
Here



Connecticut  
Light & Power  
A Northeast Utilities Company



The United Illuminating Company



Energize Connecticut – programs funded by a charge on customer energy bills.

# Claiming Energy Savings

---

- Use the CT Program Savings Document (available for public reference)
- Estimate average square footage and age of home for non-deemed measures

# Claiming Energy Savings Cont.

---

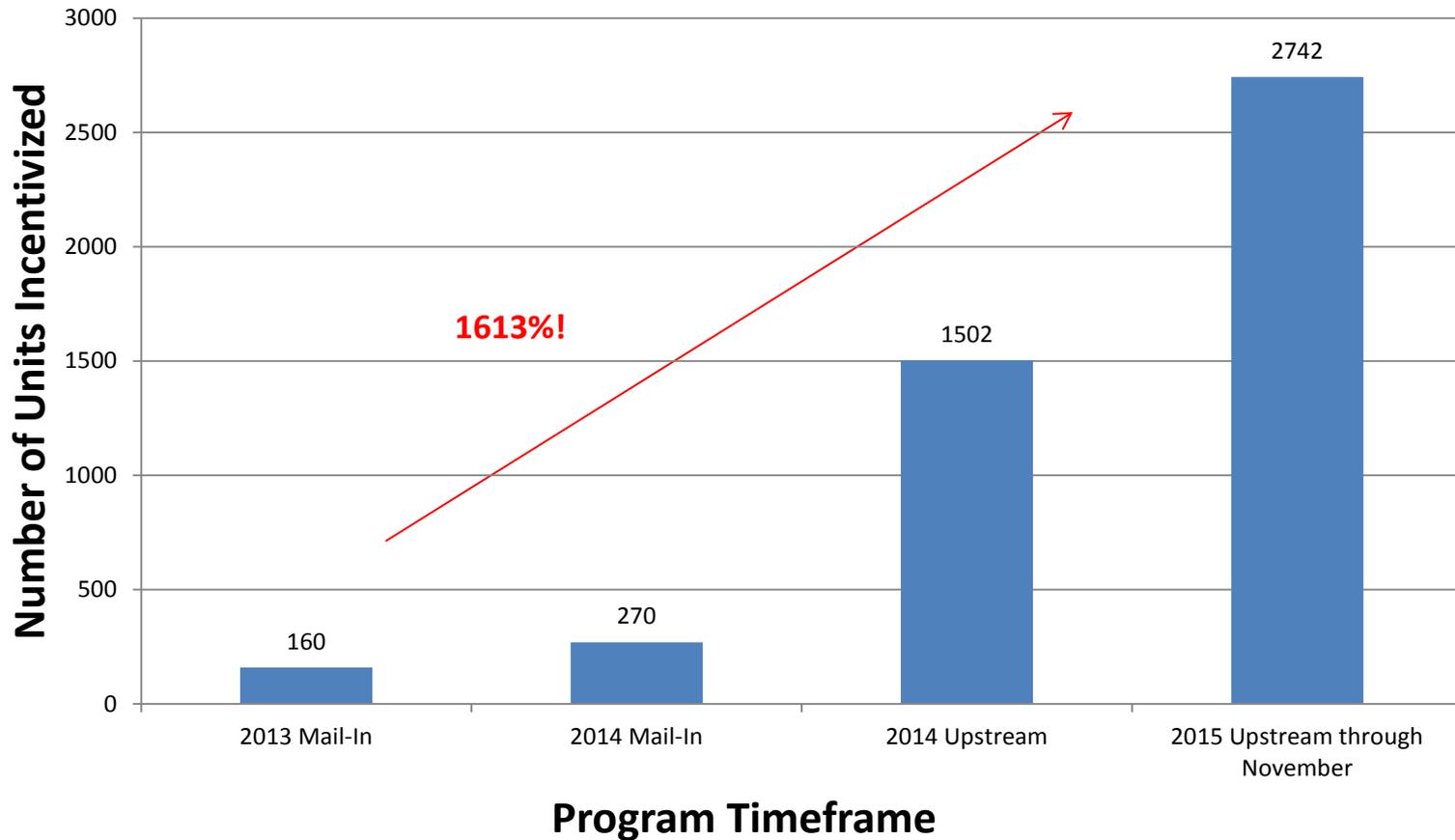
- Gas Water Heating:

$$ABTU_W = ADHW \times \left( \frac{1}{EF_B} - \frac{1}{EF_I} \right)$$

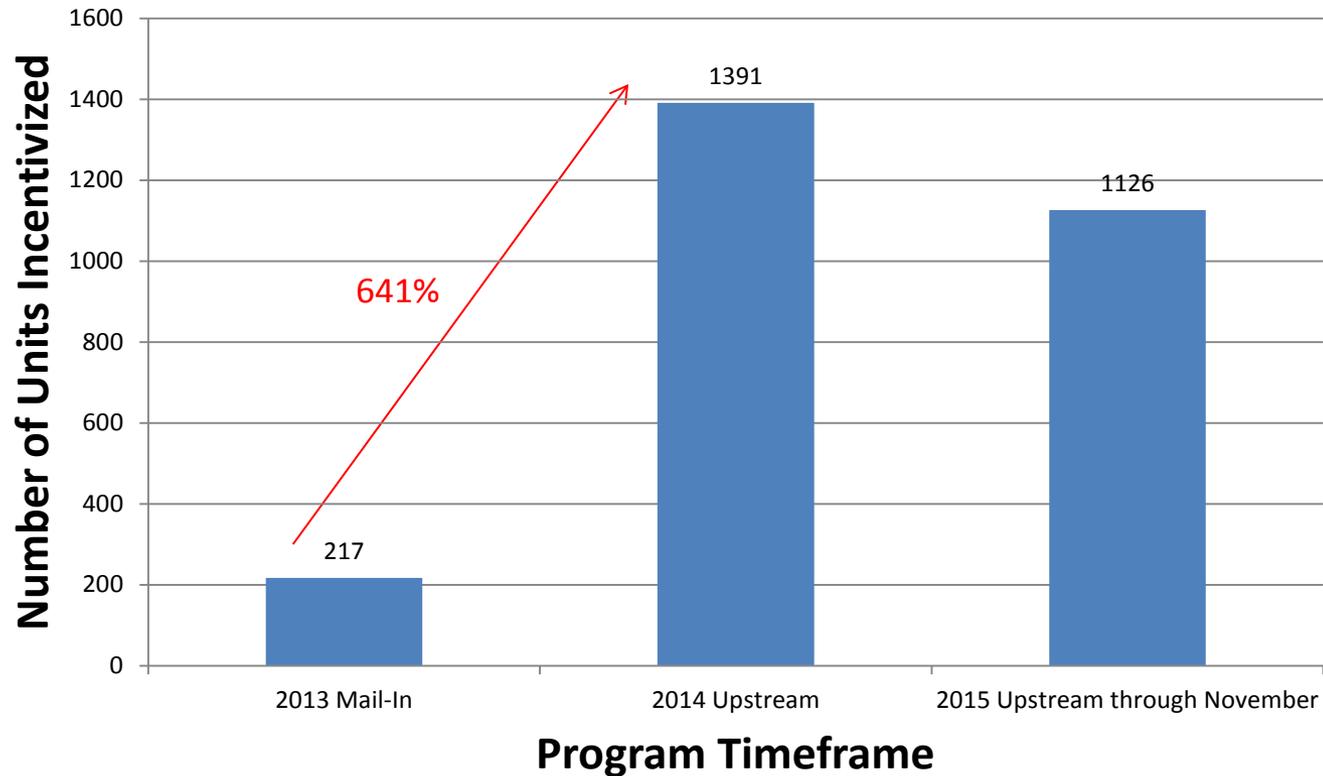
$$ACCF_W = \frac{ABTU_W}{102,900 \text{ Btu/Ccf}}$$

- Heat Pump Water Heating: (deemed)
  - 1,675 annual kWh
  - 16,750 lifetime kWh
  - 0.17 peak summer kW
  - 0.20 peak winter kW

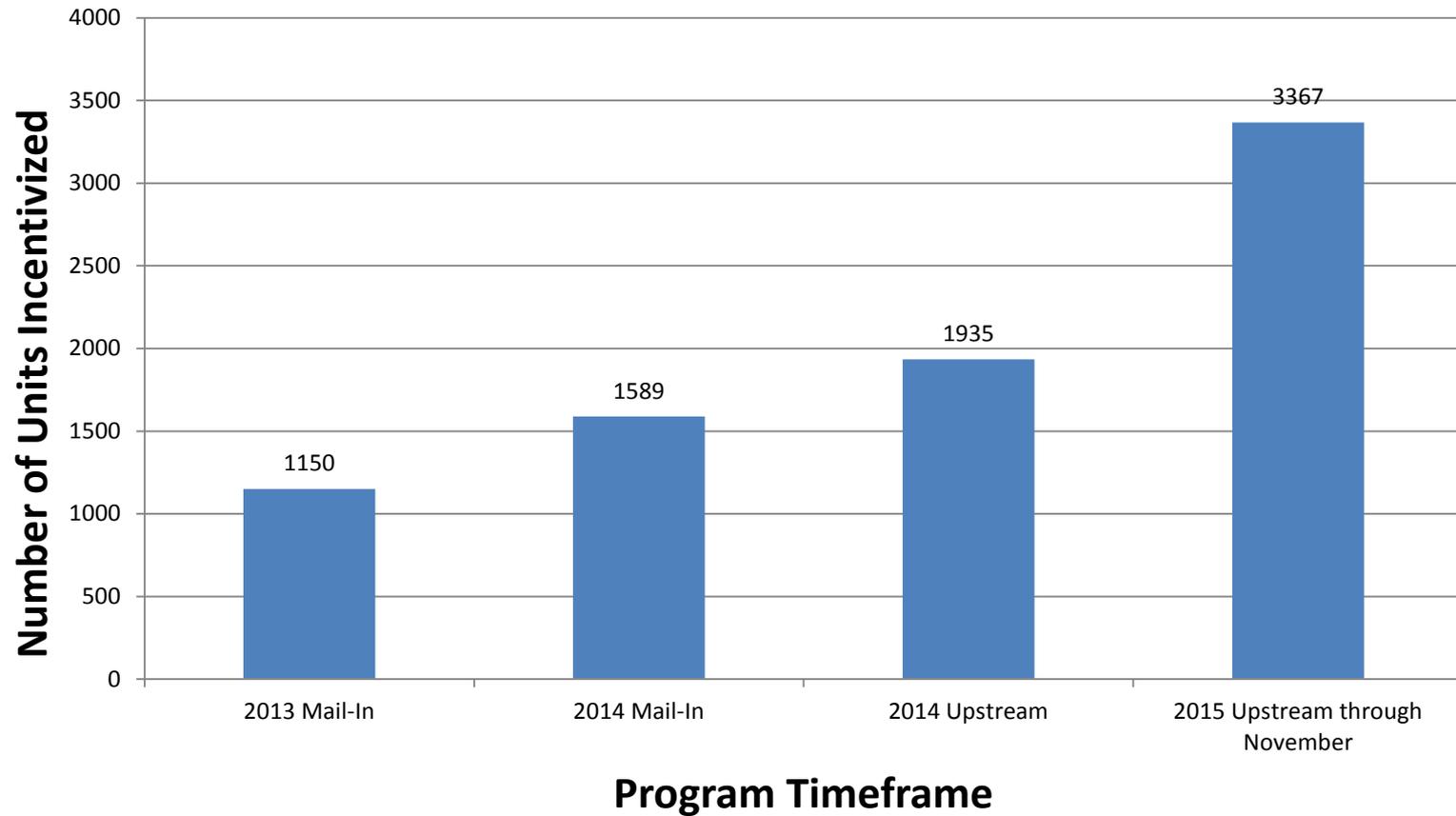
# ENERGY STAR Gas Water Heater Program Success



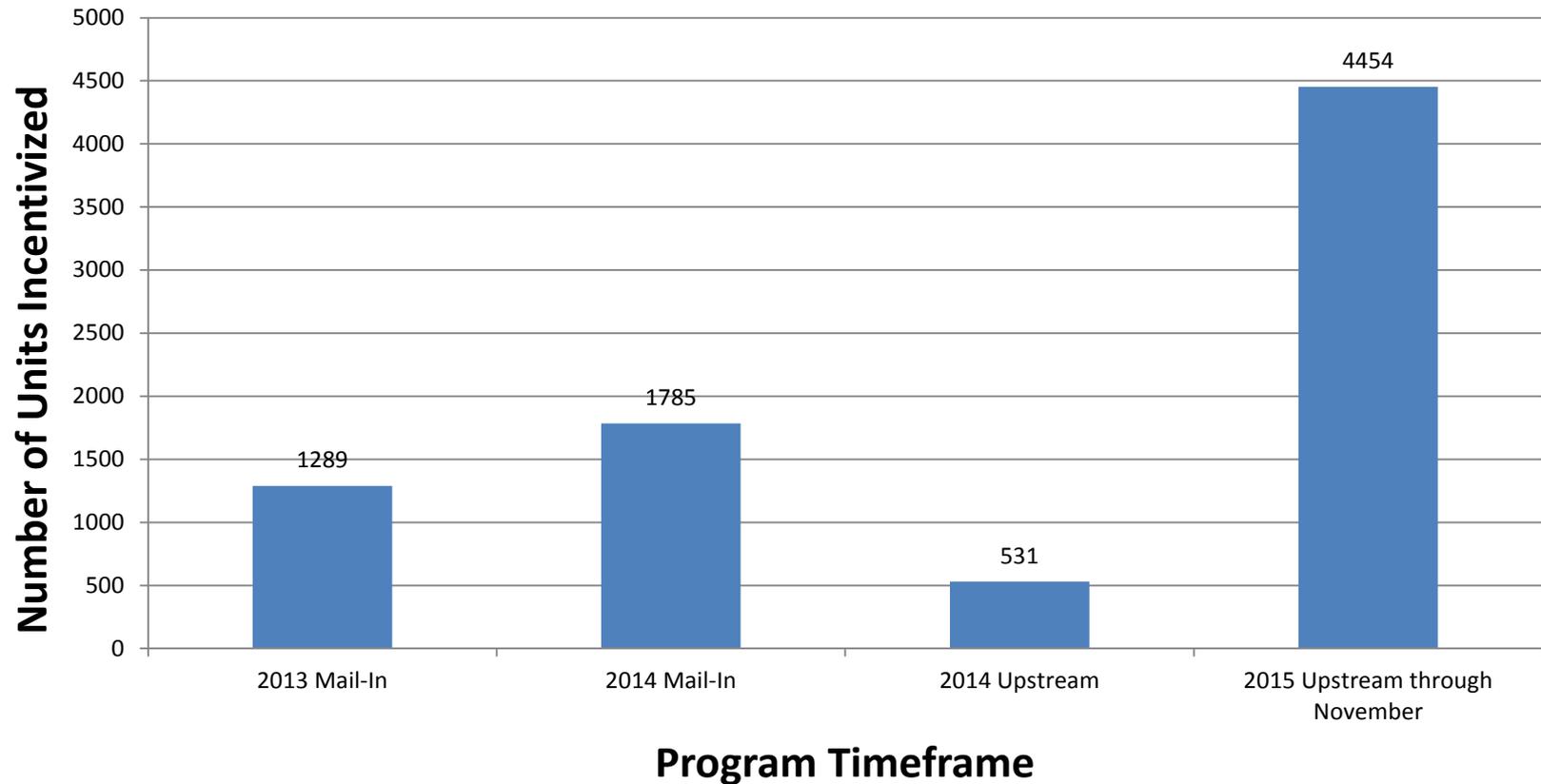
# ENERGY STAR Heat Pump Water Heater Program Success



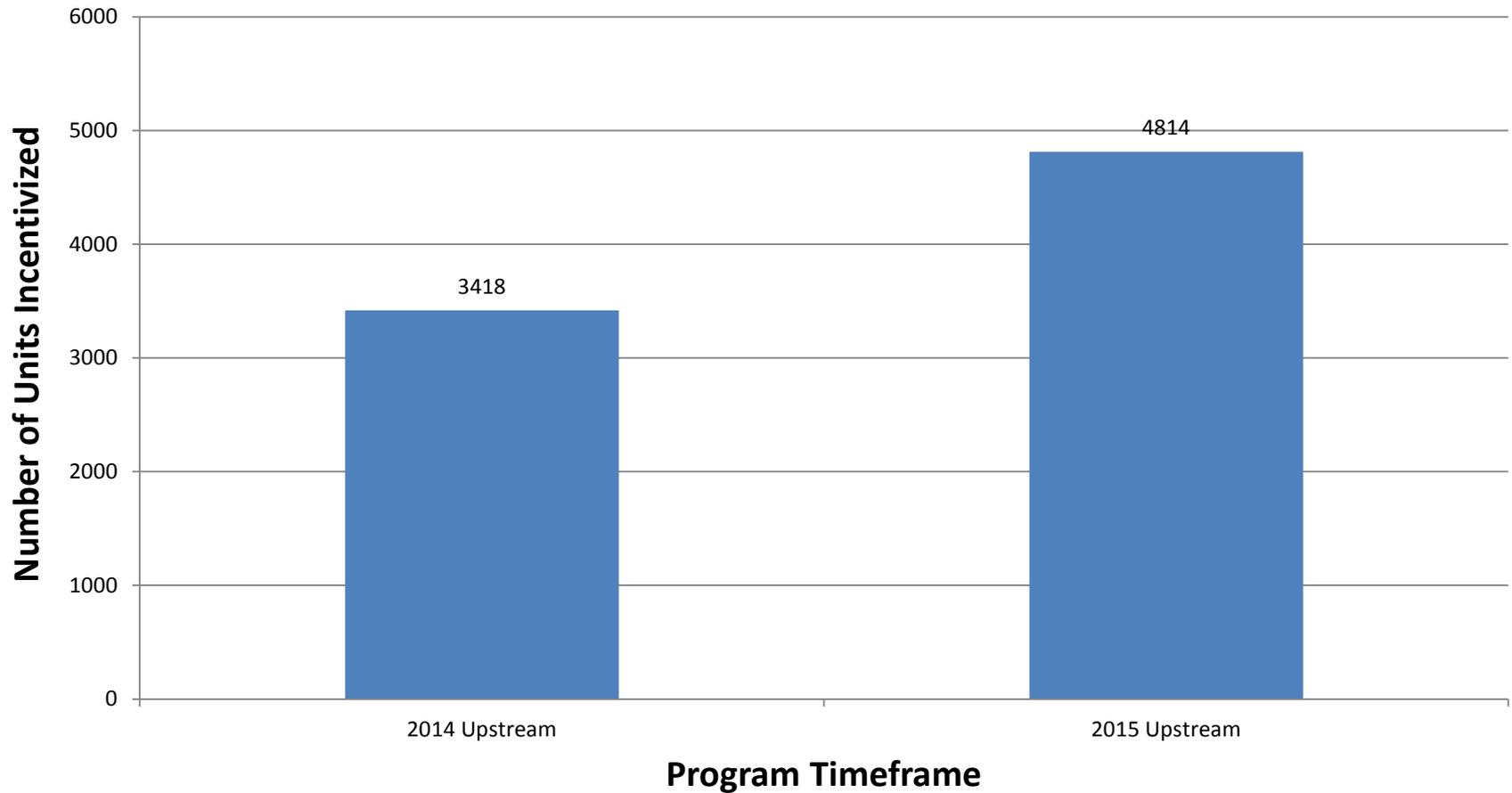
# ENERGY STAR Natural Gas Boiler Program Success



# ENERGY STAR Furnaces (Combined Fuels) Program Success



# Boiler Circulator Pumps



# Other Program Successes

---

- Strengthened relationship with HVAC community
- Reduction in rebate fulfillment costs
- Reduction in paperwork flow (less trees)
- Significant increase in C&I program participation and other residential programs

# Program Challenges

---

- Propane equipment (natural gas availability)
- Initial participation reluctance (submission collection)
- Distributor submissions
  - Eligible customers
  - Licensed installers
  - Using EXCEL
- Contractor passing along discount
- Changing customer understanding of discount
- Municipal electric territories

# Future Considerations

---

- Enhanced QA
- Proper Installation Testing
  - Training courses for installers
- Enhanced Marketing
- Federal hot water standard changes
- Measure market transformation with sales data

# Internal Logistics

---

- Cost splits for equipment in dual territory towns
- Cost coverage in municipal towns + claim savings
- Administrative Costs:
  - Rebate fulfillment vendor
  - Circuit rider
  - Processing Fees
  - Marketing Team (split between utilities when possible)
- Average Cost Rate = \$0.38 per lifetime CCF and \$0.05 per lifetime kWh

# Things To Consider in Your State

---

- Gather distributor, manufacturer and contractor network contacts – for outreach and relationship building
- Simple program design
- Accessibility of PA / Circuit Rider to answer questions
- Marketing to consumers needs to continue
- Adequate budget
- Utility collaboration

# Questions?

---

Jenn Parsons – UI, SCG, CNG

[jennifer.parsons@uinet.com](mailto:jennifer.parsons@uinet.com)

203-499-5935

Jesus Pernia – Eversource

[jesus.pernia@eversource.com](mailto:jesus.pernia@eversource.com)

860-665-5825

Web Resources:

[EnergizeCT.com/high-efficiency-heating](http://EnergizeCT.com/high-efficiency-heating)

[EnergizeCT.com/gas-water-heating](http://EnergizeCT.com/gas-water-heating)

[EnergizeCT.com/hpwh](http://EnergizeCT.com/hpwh)