

# Program Planning Template

## 2017 – 2020 Programs

### GY 7 – 9; EY 10 - 12

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Program Applicable for: Ameren \_\_\_\_\_ ComEd \_\_\_\_\_ DCEO  X   
Nicor \_\_\_\_\_ People's Gas/North Shore Gas \_\_\_\_\_

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Program Name	Direct/Self Install Program
Program Description	The Direct/Self Install Program, branded as Savings Through Efficient Products (STEP), engages hard-to-reach public facilities through an easy three-step process; participating facilities 1) schedule and participate in a facility walkthrough to gather product counts; 2) self-install the free energy-savings products shipped to their facility to begin saving energy, money and maintenance time; and 3) discover additional incentives, rebates, programs and educational opportunities to save more energy. New this plan cycle, a hybrid self/direct install design will allow some products to be installed by STEP engineers at the time of the walkthrough. The program will also pilot inclusion additional appropriate measures each year.
Program Duration	6/17 through 5/20
Delivery Strategy	<p>The STEP program consists of four major components:</p> <ul style="list-style-type: none"><li>• STEP outreach staff collect basic facility data to qualify participants, then STEP engineers perform a walkthrough assessment with the public facility's designated representative to assess the need for free, easy-to-install energy efficient products and identify potential future opportunities for deeper savings;</li><li>• At the time of walkthrough, some measures will be installed by STEP engineers;</li><li>• The participating facility installs the remaining measures, achieving immediate and cost effective energy savings;</li><li>• To complete the quality assurance protocol, the facility submits installation verification which is used to quantify savings via an Illinois TRM-based STEP dashboard; and</li><li>• STEP provides personalized program participation recommendations that can lead to deeper savings.</li></ul> <p><b>Walkthrough &amp; Initial Installation of Measures:</b> After facilities execute an Authorization and Commitment Form (committing to install all measures within three months of shipment), the STEP program begins with an onsite walkthrough facility needs assessment ("walkthrough") to identify efficient measure upgrade opportunities. The STEP walkthrough engineer meets with a representative of the facility (usually the building's facility or energy manager) to conduct an initial walkthrough to document the viability of, and need for, STEP measures. Engineers use a standardized STEP Walkthrough Collection Form, administered quickly and conveniently through a tablet-based form to track counts of approved measures. The STEP Walkthrough Collection Form allows the STEP engineers to collect and/or confirm the following data. This data will supplement the information about pre-qualified participants collected from the Department's own database. New this plan cycle, at the time of walkthrough, STEP engineers will install some limited measures. The remaining measures identified will be summarized in a supply order.</p>

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Program Name	<b>Direct/Self Install Program</b>
Delivery Strategy (Cont.)	<p><b><u>Installation, QA/QC, &amp; Verification Process:</u></b> Participants verify their supply order, after which all STEP energy efficient measures are shipped for installation by the facility representative. If shipped products cannot be utilized in compliance with program guidelines, STEP facilitates a smooth and simple product return process to ensure all products purchased through the program are successfully installed and used to save energy. The successful product return program yields a very high realization rate. Regular communication is maintained with STEP customers and the installation of all measures is verified prior to the end of the funding cycle.</p> <p><b><u>Comprehensive Report &amp; Follow-On Assistance:</u></b> Following successful participation, each facility receives a comprehensive Facility Report. The Facility Report outlines estimated TRM-based energy savings; market value of measures; and customized information about available incentives and facility personnel training programs (e.g., Building Operator Certification training). The program's low barriers to entry encourage Illinois public facilities to begin a longer energy-efficiency improvement journey. During and after installation, STEP participants are provided with information guiding them into recommended programs identified during the STEP walkthrough. The facility also receives information about the measures provided and estimated savings to build the business case for further participation in energy efficiency opportunities.</p>
Target Market	<p>Eligible: Municipal, State and Federal governments; public schools; park districts; and other public entities in the ComEd, Nicor, Peoples Gas, North Shore Gas, Ameren Gas and Ameren Electric utility territories. Previous customers of the Program (specific facilities) are not eligible.</p> <p>Target: Illinois district or agency level public facility administrators at public (e.g., school/park district or State agency contacts, who manage a portfolio of facilities who may qualify for the program). Secondary audiences include Illinois individual facility administrators and maintenance managers at public facilities.</p>
Marketing Strategy	<p><b><u>Communication Strategies and Tactics</u></b></p> <p>Attract new STEP participants efficiently and effectively by focusing outreach efforts towards regional associations that bring district level facility administrators together in Illinois.</p> <ul style="list-style-type: none"> <li>• Develop a general communication tool kit for use by STEP-targeted public facilities; include a newsletter post, one or more case studies, and any other materials that may be useful to these groups.</li> <li>• Conduct outreach aimed toward administrators and district-level decision makers.</li> <li>• Develop, market, and offer a custom webinar for district-level facility administrators.</li> <li>• Build and/or utilize an existing district-level facility administrator contact list for targeted mailings or e-blasts.</li> <li>• Speak at events that reach district-level facility administrators (e.g., Trade Ally shows).</li> <li>• Target government websites that may feature information about STEP and pitch content to them for blogs, newsletters, e-blasts, homepages, etc.</li> <li>• Capture and leverage testimonials from successful STEP participants.</li> <li>• Maintain the STEP wait list to create and accommodate demand.</li> <li>• Maintain active STEP website to share information with prospective applicants and participants.</li> </ul>

Program Name	Direct/Self Install Program
Marketing Strategy (Cont.)	<p>Guide facility participants toward a deeper retrofit. Promote partner programs as appropriate.</p> <ul style="list-style-type: none"> <li>• During STEP audit, as opportunities for deeper retrofit are identified, speak to facility maintenance team about the specifics and produce pamphlets explaining these. Distribute applicable program pamphlets, case studies, testimonials and more.</li> <li>• In the tailored Facility Report, include a customized section about the facility's opportunities for deeper retrofits; include these opportunities in a letter to accompany the report.</li> <li>• Follow up with phone call or email contact swiftly to maintain interest in next steps.</li> </ul> <p>Make advocates out of past program participants and give them the tools to spread the word about the success.</p> <ul style="list-style-type: none"> <li>• Create and deliver Certificates of Achievement to public facilities.</li> </ul> <p>2. Consider developing a kit to help public facilities to celebrate their achievements (as budgets allow). Examples of kit contents may include, but are not limited to: draft messages for school intercom announcements, digital reader boards, blog entries, newsletter blurbs, Facebook and LinkedIn posts, and tweets that can be easily customized by participating facilities for their use to promote their achievements.</p>
Eligible Measures	Commercial kitchen pre-rinse spray nozzles, LED exit signs, vending machine controls, switch-mount occupancy sensors, screw-in LED A-lamp and PAR38 lamps, low-flow faucet aerators, low-flow showerheads, occupancy sensors, and advanced power strips.

**Program Name**

Direct/Self Install Program

**Program Targets****Participation Levels**

	PY10	PY11	PY12	Total
Total Facilities	402	403	403	1208

**Annual Savings Targets**

	PY10	PY11	PY12	Total
Gross MWh	7,645	7,645	7,668	22,958
Net MWh	7,339	7,339	7,361	22,038
Gross Therms	689,368	689,807	690,370	2,069,545
Net Therms	620,431	620,827	621,333	1,862,591

**Program Budget**

ELECTRIC	PY10	PY11	PY12	Total
Implementation	\$625,487	\$626,367	\$625,700	\$1,877,555
Incentives	\$979,513	\$978,633	\$979,300	\$2,937,445
<b>Total</b>	<b>\$1,605,000</b>	<b>\$1,605,000</b>	<b>\$1,605,000</b>	<b>\$4,815,000</b>
GAS	PY10	PY11	PY12	Total
Implementation	\$185,658	\$186,817	\$186,073	\$558,548
Incentives	\$290,742	\$291,883	\$291,227	\$873,852
<b>Total</b>	<b>\$476,400</b>	<b>\$478,700</b>	<b>\$477,300</b>	<b>\$1,432,400</b>
COMBINED	PY10	PY11	PY12	Total
Implementation	\$811,145	\$813,184	\$811,773	\$2,436,103
Incentives	\$1,270,255	\$1,270,516	\$1,270,527	\$3,811,297
<b>Total</b>	<b>\$2,081,400</b>	<b>\$2,083,700</b>	<b>\$2,082,300</b>	<b>\$6,247,400</b>

**Cost-Effectiveness Results**

	Test Results
TRC	3.63
TRC with NEBs	3.99
UCT	3.88

	Cost Per Unit Saved
Electric	\$0.66
Natural Gas	\$2.31