

TAKE CHARGE™

# Energy Efficiency Trade Ally Training

## 2024



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# Appalachian Power Program Contacts

## Home Performance and SBDI Programs:



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# Implementation Contractor Contacts - TRC Companies

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# Virginia EE Programs

## C&I Programs:

### Business Energy Solutions (BES)

The Business Energy Solutions (BES) Program provides cash incentives and technical assistance for energy efficiency projects at businesses for improvements to facility lighting, HVAC, VFDs, kitchen equipment, and more. Businesses can receive up to \$25,000 each for lighting and non-lighting projects, for a total of \$50,000.

### Small Business Direct Install (SBDI)

The SBDI Program helps small business owners save money and lower energy use. Easy upgrades like energy efficient lighting and occupancy sensors not only help reduce operating costs and maintenance but also can improve productivity by providing a more comfortable work environment. The Program provides businesses with a peak demand of less than 200kW a month targeted, cost-effective energy efficiency measures to small businesses when participating in the Quick Energy Checkup (QEC), and a no cost walk-through to identify energy and cost-saving opportunities.

### Custom Program

The Custom Program offers tailor-made ways for businesses to save energy and money at their Commercial and Industrial (C&I) facilities. Many different projects are eligible for incentives. Lighting projects are incentivized at \$0.04/kWh, and non-lighting projects are incentivized at \$0.09/kWh.



# Residential Programs:

## Home Performance Program

The Home Performance Program is designed to help customers save money and energy as well as increase comfort in their homes. Energy Advisors visit homes to perform energy assessments at no cost to identify areas where they could become more efficient. Rebates are available for this program, when approved contractors are used.

## Bring Your Own Thermostat (BYOT)

The Bring Your Own Thermostat (BYOT) Program helps customers earn money and save energy by enrolling home smart thermostats. Appalachian Power makes brief changes to central air-conditioner settings on a limited number of peak demand days. Customers enrolled will receive a one-time payment of \$50 for enrolling, and a check at the end of the summer season for up to \$25 additionally (\$5 for each month they participate, May through September).

## Low-Income Multifamily Program

The Low-Income Multifamily Program reduces energy consumption by educating residential customers on energy and money-saving benefits associated with energy efficiency in the home. The program targets opportunities to save energy, reduce consumption, and protect the health and safety of occupants while helping to lower their electric bills.

# Residential Programs cont...

## Low-Income Weatherization

The Low-Income Weatherization Program provides weatherization products and services to qualifying residential customers.

This program is implemented by local Virginia Weatherization Service Providers, which receive funding from Appalachian Power to supplement existing state and federal low-income weatherization programs.

## Energy Efficient Kits

The Energy Efficiency Kit Program offers free kits with products to make homes more energy efficient. Customers sign up and receive a free kit with products that can help them save energy. Other energy efficient products are also available for purchase on our marketplace. All marketplace orders greater than \$50 ship for free.

## Efficient Products Instant Discounts

The Efficient Products Program provides instant savings when you buy Appalachian Power labeled weatherization products from a participating retailer (including Home Depot, Lowe's, Walmart and Sam's Club). Product selection and availability varies by store.

## Efficient Products ENERGY STAR® Appliances

The Efficient Products Program offers rebates on qualifying ENERGY STAR certified appliances. Purchase from an online or local retailer and apply for a rebate through the Appalachian Power portal.

# Why Become a Trade Ally?

By becoming a Trade Ally with Appalachian Power and the TakeChargeVA programs, you will be on the list of professionals that residential and business customers can employ for updates to their homes or facilities. You might be hired to consult about, install, or upgrade appliances, systems, and equipment that increase energy efficiency.

## Trade Allies gain:

- **Increased Exposure:** Access to a broad base of customers eager to engage in energy efficiency projects for their businesses.
- **The Potential for Business Growth:** Opportunities to expand your services and increase your market reach.
- **Support & Resources:** Availability of marketing materials and technical resources to help you along the way.





# Trade Ally (TA) Expectations

by individual program

## Business Energy Solutions (BES)

- TA must complete all provided training.
- TA must wear APCo Participating Contractor branded material when working with customers. (See Marketing Materials/ Guidelines section for more details).
- All customer-facing program materials and collateral must be APCo-approved.
- TA should be timely when working with customer and implementer to schedule a project. Once a customer has expressed interest in the program and a project, the TA should contact the customer within 48 hours to begin scheduling.
- The BES program is available for C&I customers within the APCo VA service territory that have not yet reached the \$25,000 annual ceiling by project type (Lighting or Standard).  
Customers served under Appalachian Power's Virginia Non-residential tariffs, such as Schedule M.G.S. (Medium General Service) or Schedule G.S. (General Service), but not served under the Public Authority or Commonwealth of Virginia tariffs, may be eligible for Appalachian Power's TakeCharge Programs.
- Businesses can receive up to \$25,000 each for lighting and non-lighting measures for a total of \$50,000 each calendar year, capped at 30% of total project cost.
- Measure installs can be performed by both the customer and TA.

# Trade Ally (TA) Expectations cont.

## BES continued

- All projects must be entered into the TA portal. This should be in provided training. If you have questions regarding the TA portal, please contact one of the TRC outreach coordinators.
- No turning away projects. TAs must be honest when listing areas they are willing to actively serve. If you list that you will serve a specific area, then you must be willing to go there.

## Small Business Direct Install (SBDI)

- TA must complete all provided training.
- TA must wear APCo Participating Contractor branded material when working with customers. (See Marketing Materials/Guidelines section for more details).
- TA should be timely when working with a customer to schedule a project. Once a customer has expressed interest in the program and a project, the TA should contact the customer within 48 hours to begin scheduling.
- The SBDI program is available for commercial customers with a peak demand of 200kW or less.
- The annual incentive cost cap is \$25,000.
- TA must install all measures. Customer self-installation is not allowed.
- All customer-facing program materials and collateral must be APCo-approved.

# Trade Ally (TA) Expectations cont.

## SBDI continued

- All projects must be entered into the TA portal. This should be in the provided training. If you have questions regarding the TA portal, please contact TRC.
- No turning away projects. TAs must be honest when listing areas willing to serve. If you listed that you will serve a specific area, then you must be willing to go there.

## Custom Program

- TA must complete all provided training.
- TA must wear APCo Participating Contractor branded material when working with customers. (See Marketing Materials/Guidelines section for more details).
- All customer-facing program materials and collateral must be APCo-approved.
- TA should be timely when working with a customer and implementer to schedule a project. Once a customer has expressed interest in the program and a project, the TA should contact the customer within 48 hours to begin scheduling.
- Custom projects can take a longer time period to install. TA should maintain communication throughout the process.
- C&I customers served at retail by APCo in Virginia who have not opted out of energy efficiency programs are eligible to participate in the Custom C&I Program. Non-Jurisdictional customers, such as those served under the Public Authority or Commonwealth of Virginia tariffs, are not eligible to participate in this program.

# Trade Ally (TA) Expectations cont.

## Custom continued

- Any energy efficiency measure qualifying for incentives through the Business Energy Solutions (BES) Program or Small Business Direct Install (SBDI) Program will not be an eligible measure under the Custom C&I Program.
- Project must save a minimum of 50,000 annual kWh.
- Completed and installed projects are subject to a post-inspection performed by an Appalachian Power program representative. All projects with estimated savings of more than 250,000 kWh require a pre-and-post inspection.
- Incentives for Custom measures will be paid per kWh reduced:
  - Savings resulting from the installation of non-prescriptive lighting measures will be paid at \$0.04 per annual kWh reduced.
  - Savings from all other custom measures will be paid at \$0.09 per annual kWh reduced.
- Measure installs can be performed by both the customer and TA.
- All projects must be entered into the TA portal. This should be in the provided training. If you have questions regarding the TA portal, please contact TRC.
- No turning away projects. TAs must be honest when listing areas willing to serve. If you listed that you will serve a specific area, then you must be willing to go there.

# Trade Ally (TA) Expectations cont.

## Home Performance Program

- TA must complete all provided training.
- TA must wear APCo Participating Contractor branded material when working with customers. (See Marketing Materials/ Guidelines section for more details).
- The Home Performance Program is available to all single-family residential customers that are located in APCo's territory.
- TA must be timely when scheduling HEAs. Once a customer has signed up for an HEA, the TA should contact the customer to schedule the HEA within 48 hours.
- The cost cap for Home Performance Direct Install measures is \$600. The TA should try to get as close to that cost cap per customer, if possible. The TA can inform customers of major measures that customers could install and earn a rebate if they qualify.
- Major measure rebates are only available to customers with electric heat.
- TA will provide a report after each HEA to provide more energy savings recommendations for customers. This is a great opportunity to cross promote APCo's other energy efficiency programs.
- All customer-facing program materials and collateral must be APCo-approved.



# Trade Ally (TA) Expectations cont.

## Home Performance Program continued

- TA is not allowed to turn away customers based on their home type (e.g., cannot turn away a customer for having gas heat).
- All projects must be entered into the TA portal. This should be in the provided training. If you have questions regarding the TA portal, please contact TRC.

## Marketing Materials/Guidelines

Marketing collateral is used to communicate and promote Appalachian Power and its brand, messaging and services. To accommodate the needs of trade allies, we have a [Media Downloads](#) page available where TAs can access logos, templates, brand guidelines, and more. Please use the following information to log in:

- Username: media
- Password: media

Any marketing-related proofs must be sent to the team for review [using this form](#). Please use these materials as needed and contact us with any questions.

### Use of TakeCharge logo

All TAs must use the “Participating Contractor” logo on materials and apparel and must get approval by the APCo EE team in advance of deployment.



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*Participating Contractor*

# Virginia Stakeholder Process

Appalachian Power (APCo) must use a stakeholder process in Virginia to gather and receive feedback and input when developing proposed energy efficiency programs.

This stakeholder process involves at least two (virtual) meetings per year with participation from different stakeholders. The stakeholders include all classes of energy consumers, renewable energy advocates, community members, members of environmental organizations, program implementation contractors, and any other interested party. Stakeholders are given the opportunity to provide written comments and feedback concerning all points of discussion.

## Goals of the Stakeholder Process:

- Propose and assist in developing EE/DR programs
- Increase transparency of the utility process from recommendation to implementation
- Identify gaps in existing, and pending, programs

## Stakeholder Rules:

- Must hold regular stakeholder meetings lead by an independent contractor.
- Minimum of 2 per year
- Implementation contractors can attend
- Great way to make program suggestions

If you would like to be added to the stakeholder list for future meetings, please contact our [Independent Monitor](#).

# Virginia Filing Process

To implement programs in the Virginia service territory, Appalachian Power must file them for approval by the VA SCC. The EE Team:

- Identifies programs that are cost-effective and make sense for customers.
- Identifies all potential energy efficiency measures that could be included in each program. (No measure can be implemented in Virginia unless it is cost-effective and approved by the State Corporation Commission.)
- Reviews proposed programs with Stakeholder group for additional input and suggestions.
- Issues RFPs to prospective contractors to implement the programs.
- Identifies the total cost to implement programs and strategies to improve them.
- Prepares program templates for each program that:
  - Describe the program
  - Outline implementation plan, incentives, marketing, and EMV strategies
- Files the programs with the Commission.
- Develops testimony
- Serves as Expert Witnesses during scheduled hearings.
- Secures Commission approval to proceed (or not proceed)
- Secures contracts with selected contractors for approved programs.
- Develops program launch plans.

# Virginia Filing Process cont.

- Develops marketing plan and materials.
- Launches programs in approved program start year.
- Develops a spreadsheet tracking template for all program costs, participants, incentives paid, percent to goals, etc.
- Ensures all invoices have adequate data and documentation.
- Addresses issues that may arise during program implementation.
- Evaluates programs each year to verify that they are working as designed.
- Files annual EM&V reports.

The entire process of designing, filing for, and implementing a new program typically takes 2-to-3 years.



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