# Trade Ally Quarterly Meeting

## Program Updates

November 19, 2026



We will begin the presentation shortly

# AGENDA

- Safety Moment
- Program Reminders
- Program Updates
- Marketing
- Support
- Q&A



# Safety Moment






APPALACHIAN POWER | TAKE CHARGE

TRC Member of WSP

# Program Updates



# Small Business Direct Install

**Still accepting self-install projects**
**Who can submit the application?**

- Qualified small business *customer*
- 3rd party rebate processor submitting the application
- Trade Ally

*Projects with no TA involved will be subject to a post-inspection.*

**Limited Time Offer**

- Increased incentives through year end
    - Exterior lighting
    - Lighting controls
    - HVAC systems
    - HVAC controls
    - Electric water heaters

*Refer to program incentive guides for increased incentive amounts

# Business Energy Solutions

**Reminder of Incentive Cap Increase**

- Incentives up to 50% of their total project cost (previously it was 30%)
- If you have a project that will exceed the customer's annual cap of $100,000 each for lighting and non-lighting projects, projects will be considered case-by-case

**Limited Time Offer**

- Increased incentives through year end, 2026
    - Exterior lighting
    - Lighting controls
    - HVAC systems
    - HVAC controls
    - Electric water heaters

*Refer to program incentive guides for increased incentive amounts

# Trade Ally Gift Cards

Reminder, qualifying TAs who submit applications for select measures through the following programs can receive a VISA gift card:

**Virginia**

- **HP Rebates**
- **SBDI**
- **BES**

**West Virginia**

- **SBDI**
- **Go-Electric HVAC**
- **Go Electric L2EV Chargers**

- Offered to new and existing TAs who enroll in the program and go through the required training process.
- There is a minimum savings threshold for eligible projects, and gift cards will not be distributed until after project completion.
- The first five eligible projects submitted by a new TA will be subject to a 100% inspection rate.

For HP details, contact Jeff Lineberry jlineberry@trccompanies.com
For all other programs, contact Shannon Lingo ssavagelingo@trccompanies.com

# Trade Ally Gift Cards

**Program Gift Card Terms**

- $40 gift card
  - VA SBDI
  - VA BES
  - WV SBDI
  - WV Go Electric
- The incentive will *not* be offered for customer self-installed projects or to 3rd party rebate processors who are not performing the actual installation
- each project must meet a minimum of 150 kWh savings
- Only **one** $40 gift card may be given per project even if it has multiple measures on the application.

**Home Performance Program Gift Card Terms**

- Incentive for Qualified Contractors submitting HP rebate projects (not available for HEAs)
- $40 gift card with a minimum of 300 kWh savings per project
- $25 gift card for smart thermostats
- Multiple measures if totaling over 300 kWh Savings installed will count toward 1 gift card

# Trade Ally Gift Cards

**FAQ's**

1.Who receives the gift card?

The gift card will be emailed to the TA company owner or primary representative for the Trade Ally in the program network, and it will be up to the company owner to decide how the value of that gift card is distributed. The gift cards will be distributed by email from a TRC vetted 3rd party gift card company such as "Tremendous LLC".

2.Can Trade Allies receive multiple incentives on a single customer project?

If a TA is submitting two or more different qualifying measures on the same project, they would only be eligible for one gift card for that project even though it has multiple measures. However, two **different** TAs could be submitting **different** projects for the same customer. In that case, both TAs would be eligible for a TA gift card.

3.Is there any participation target or limit for individual Trade Allies?

No, we want to encourage project submissions.

4.How long will this gift card offer last?

TRC will re-assess the gift card budget once we reach the first $3000 in gift card distribution. Act now, while funds last.

# Home Performance

| Recent Changes | Status |
|---|---|
| **VA Home Performance** | |
| Increased the HEA Direct Install Cap to $800 | As of 8/13/26, 135 HEAs have been completed @ the $800 cap. Average savings has increased to ~1400 kWh/home for HEAs > $600 cap to $800 cap. |
| Gift Card Incentives for TAs completing HP Rebate Projects | Active as of 8/27; 28 rebate project have been eligible for $40 gift cards; Thank you to those participating. |
| Marketing Campaign to Underserved Areas to promote Home Energy Assessments | Ongoing now to these counties below – Emails and Postcards. |




**HEA Postcards are being sent to these counties:**

Albemarle, Botetourt, Buchanan, Buckingham, Campbell, Carroll, Craig, Giles, Grayson, Nelson, Pittsylvania, Roanoke, Russell, Scott, Smyth, Tazewell, Wise, and Wythe

APPALACHIAN POWER | TAKE CHARGE

TRC Member of WSP

11.10.26

# TA Awards

- Nov. 10, 2026 – more than 50 Attendees
- Location: Salem Ridge Yaks Stadium
  - Stadium tour followed by Lunch
- Crystal Awards were presented to the winners:
  - Most Energy Savings: HEAs & Direct Install: - Earth Right Mid-Atlantic
  - Most Energy Savings: HP Rebate Projects - New River Insulation
  - VA Rising Star: Jake Clem - VA Energy Solutions, Inc.
  - Outstanding Energy Advisor: Irving Demecio - Solutions Heating and Cooling
  - Most Energy Savings: VA SBDI - Shively Electric
  - Most Energy Savings: BES - Diversified Electrical Technologies, Inc.
  - WV Rising Star: John “Ed” Castro - Alpha Omega Lighting, Inc.
  - Excellence in Partnership: John Lockwood - VA Energy Solutions
- Awards video: https://youtu.be/plBqNVGykM4?si=Co-BydQ16upuiL8e






# VA: SBDI, Custom, and BES VA Update - 2027 Program Changes

VA SBDI, BES, and Custom Talking Points

***New Energy Efficiency Opportunities Coming in 2027***

*Appalachian Power is bringing new Energy Efficiency programs to commercial and industrial customers in 2027. BES and SBDI will continue with program changes and a new implementation contractor. More information will be available soon. Programs will launch early 1st quarter of 2027.*

*Current BES and SBDI projects where all work can be completed before December 31, 2026 will remain unchanged.*

| 2027 APCo Commercial & Industrial EE Programs | |
|---|---|
| **Current** | **New** |
| **Business Energy Solutions** | Building Controls |
| **Small Business Direct Install** | C&I Agriculture |
| | Compressed Air |
| | Custom |
| | Deep Dive Energy Solutions |
| | Midstream |
| | New Construction |
| | Virtual Commissioning |

**NOTE: 2027 Projects - Please do not enter projects with a 2027 completion date in the Online Portal. Email those project details to a TRC outreach representative so they can track those projects to pass on to APCo.**

# 2026 Project Close-out

**VA Project Close-Out**

- Please send in final documents as soon as possible.
- Installation **must be** completed by December 31, 2026.
- Photos of installation recommended to confirm 2026 deadline.
- Final project review and close-out will continue in January 2027.

**WV Project Close-Out**

- Please send in final documents as soon as possible.
- Projects still open will carry over to 2027.

# Contact Us



**TODD EWALD**
Commercial Account Manager

BES, SBDI, Custom
tewald@trccompanies.com
540-655-8452



**KALEIGH MASON**
Commercial Account Manager
& Trade Ally Manager

BES, SBDI, Custom
ksmason@trccompanies.com
910-444-8629



**KENNEDY NWABIA**
Commercial Account Manager

BES & SBDI
knwabia@trccompanies.com
833-402-2221



**JEFF LINEBERRY**
Residential Account Manager

HP
Jlineberry@trccompanies.com
276-266-5338



**COTY BLANKENSHIP**
Commercial Account Manager

WV SBDI & GE
eblankenship@trccompanies.com
304-543-7385

## Virginia

**Email:** TakeChargeSavings@trccompanies.com

**Phone:** 1-833-402-2221

## West Virginia

**Email:** WestVirginiaTakeCharge@trccompanies.com

**Phone:** 1-855-242-6645

APPALACHIAN POWER | TAKE CHARGE

TRC Member of WSP

# TRC – Program Implementation Team



**Deborah Hill**
*Program Director*



**Shannon Lingo**
*Program Manager*



**Fran Phillips**
*Operations Manager*



**Kaleigh Mason**
*Commercial Account Manager*



**Todd Ewald**
*Commercial Account Manager*



**Kennedy Nwabia**
*Commercial Account Manager*



**Jeff Lineberry**
*Residential Account Manager*



**Coty Blankenship**
*Commercial Account Manager*



**Courtney Capshaw**
*Marketing Director*



**Kasey Campbell**
*Senior Marketing Manager*

APPALACHIAN POWER | TAKE CHARGE

TRC Member of WSP

# Appalachian Power Program Management

**Virginia BES and Home Performance**
**WV SBDI**



**Malcolm Saunders**
*EE & Consumer Programs Coordinator*
**304-786-6859**
ssaunders@aep.com

**Virginia BES and SBDI**



**Jason Johannessen**
*EE & Consumer Programs Coordinator*
**540-682-0325**
jjohannessen@aep.com

**Virginia Home Performance**
**WV Go Electric**



**Jack Shepherd**
*Associate EE & Consumer Programs Coordinator*
**540-798-9726**
rjshepherd@aep.com

**Virginia**
**WV**



**Nick Bragg**
*EE & Consumer Programs Coordinator Assc.*
**304-546-4965**
nbragg@aep.com

**Virginia**



**Hannah Hutchinson**
*Associate EE & Consumer Programs Coordinator*
**826-253-4244**
hhutchinson@aep.com

**Virginia Marketing**
**WV Marketing**



**Mackenzie Mize**
*EE & Consumer Programs Marketing Coordinator Sr.*
**304-993-6874**
cmize@aep.com

APPALACHIAN POWER | TAKE CHARGE

TRC Member of WSP