



ELEVATE

Equity through climate action

Community Climate Action Residential Rebate Administrator

RFP # 23-48

SEPTEMBER 2ND, 2023



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A. Professional Qualifications

A.1. Organization Information

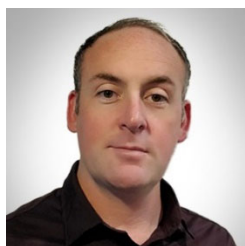
Elevate Energy (Elevate) is a nonprofit corporation, headquartered at 322 S. Green St. Ste 300, Chicago, IL 60607. Elevate currently has a branch office in Tech Town at 440 S. Burroughs St. Detroit, MI 48202. Elevate is licensed to operate in the State of Michigan.

A.2. Personnel

MANAGEMENT

Henry Love, Vice President, Strategy

***Key Personnel *Rebate Program Experience *Project Management Experience**



Henry Love is Vice President Strategy at Elevate. In this role, he works with partners across the Midwest to develop projects, programs, and initiatives for equitable solutions to climate change that provide healthy, safe, and affordable homes for everyone. Henry will provide strategic guidance to the HEA Program Manager both during the startup phase and throughout implementation.

Before joining Elevate, he served as Executive Director of the American Jobs Project, which he co-founded with current Secretary of Energy and former Michigan Governor, Jennifer Granholm. He served as Assistant Director of Michigan Energy Options from 2009 to 2015 and has been an executive-level strategy consultant to nonprofit organizations in energy as well as local economic development and workforce development for disadvantaged communities. He has also developed programs for academic institutions, such as the University of California Berkeley and the University of Michigan.

Education and Certifications:

B.A.A., Entrepreneurship and Finance, Central Michigan University, 2007

MBA, University of Phoenix, 2010

Relevant Skills and Experiences:

Program development and design, technical consulting, climate planning, energy modeling, data analytics, community-scale electrification and decarbonization, project management, research, onsite and virtual assessments, operational budgeting.

Location:

Ann Arbor, MI

Elizabeth Wallace, Associate Director, Michigan Community Programs

***Key Personnel *Project Management Experience**



Elizabeth Wallace is Elevate's Associate Director of Michigan Community Programs. In this Southeast Michigan-based role, she manages Elevate's Michigan program team to implement programs and projects across the state, while leading projects in Detroit. Elizabeth builds Elevate's relationships with local partners, leads project teams through project management, develops new projects and grant proposals, and supports strategic planning in Michigan. Elizabeth directly supervises our Program Manager for the HEA.

Prior to joining Elevate, Elizabeth worked with the City of Detroit's Office of Sustainability, served in a fellowship with EcoWorks, interned with the World Wildlife Fund's Climate team with the Science Based Targets Initiative, completed graduate research on utility affordability in Detroit and renewable energy policy in Michigan, and worked in management consulting at Deloitte Consulting with a focus on the future of mobility and smart cities.

Education and Certifications:

M.B.A., Business Administration, and M.S., Environmental Justice; Environmental Policy and Planning, University of Michigan, Ann Arbor, 2022

B.B.A., Business Administration, and B.A., Spanish Language and Literature, University of Michigan, Ann Arbor, 2014

Relevant Skills and Experiences:

Program management and development, community outreach and engagement, strategic planning, energy analytics, financial modeling, single family electrification and decarbonization

Location:

Detroit, MI

Jamie Simmons, Program Manager, Michigan Community Programs

***Key Personnel *Project Management Experience**



Jamie Simmons is a Program Manager on the Michigan Community Programs team at Elevate. In this role, she manages Elevate's Ann Arbor based programs. Jamie helps build and expand relationships in Washtenaw County and across Michigan, lead project teams through project management, and supports the program development and strategic planning across Michigan. Jamie will be the lead Program Manager overseeing the HEA and will directly supervise the HEA Project Manager, who will be hired locally.

Prior to joining Elevate, Jamie worked with Michigan Climate Action Network as the Engagement Director. She also worked as the Community Engagement Reporter and Program Coordinator for NPR's Michigan Radio.

Education and Certifications:

M.S.W Community and Social Systems, University of Michigan, Ann Arbor, 2020

B.A, Criminal Justice, Michigan State University, East Lansing, 2019

Relevant Skills and Experiences:

Program management, state and community wide organizing, communications, community outreach and engagement, home decarbonization.

Location:

Ypsilanti, MI

Alexander Helbach, Senior Art Director



Alexander Helbach is the Senior Art Director of Elevate, a nonprofit organization dedicated designing and implementing efficiency programs that lower costs, protect the environment, and ensure the benefits of energy efficiency reach those who need them most. In this role, Alex manages Elevate's Assistant, Graphic Design and Communications and the organization's visual identity. He works closely with the Communications and Marketing team to create materials that promote Elevate's brand and program offerings. Alex utilizes print and digital design as well as animation, to create simple graphics that visually and engagingly explain complicated efficiency concepts.

Before joining Elevate, Alex was a Graphics Producer at the Chicago Tribune, where he created high-impact information graphics and animations that ran in the print and online editions. Before moving to Chicago, he worked as the front-page designer for the Lansing State Journal in Lansing, Michigan.

Education and Certifications:

B.S, Visual Communications- Publication Design and Information Graphics, Ohio University, Athens, OH, 2010

Relevant Skills and Experiences:

Website design, managing creative programs, informative motion graphic, marketing materials, video edits, designing technical reports, high impact digital.

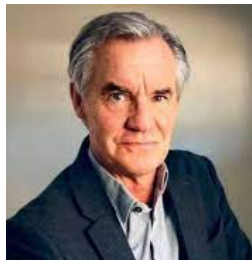
Location:

Chicago, IL

SUBCONTRACTORS

Michigan Energy Options

John Kinch, PhD, Executive Director



Kinch directs the strategic and daily operations of Michigan Energy Options (MEO), a clean energy nonprofit emphasizing innovative and collaborative projects between the public and private sectors. Under Kinch, MEO's community-based work has expanded across the state and its revenue stream has diversified. MEO built a community solar park on a capped landfill—one of a few owned and operated by a nonprofit in the country. Kinch is a U.S. Department of Energy SunShot advisor and a National Community Solar Partner, a municipal- certified solar expert by the National Renewable Energy Laboratory, local clean energy consultant for the Council of Michigan Foundations and has been a renewable energy consultant for The Nature Conservancy. He presents often to professional, academic, and general audiences.

Education and Certifications:

Ph.D. in American Studies, Michigan State University

B.A. in English, Michigan State University

Relevant Skills and Experiences:

Strategic planning, clean energy consulting, climate consulting, stakeholder engagement, risk management, compliance oversight, contracts, data analysis, technical writing, organizational budgeting.

Location:

Grand Haven, MI

Michael Larson, MPA, Assistant Director

***Rebate Program Experience *Project Management Experience**



Michael handles daily operations, program management and oversight for renewable, energy efficiency and planning projects across the state. His experience includes working with local governments, grant management, statewide utility program management, community solar management and organizational development. Larson is current city commissioner in Marquette and former planning commissioner.

Education and Certifications:

Master of Public Administration, Northern Michigan University, 2009

Graduate Certificate: Facilitation and Training, 2011

Bachelor of Science in Public Relations, 2003

Relevant Skills and Experiences:

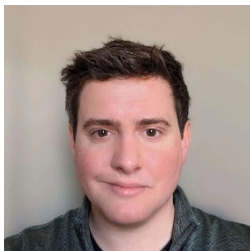
Program design and management, grant management, utility program oversight, budget preparation, community engagement, municipal planning, building assessments, climate and energy consulting and reporting.

Location:

Marquette, MI

Brandon Kawalec, Sr Program Manager

***Rebate Program Experience *Project Management Experience**



Brandon manages MEO's Utility energy efficiency and renewable energy rebate programs. This work involves large data sets, organization, and detailed reporting. His work includes program design, implementation, and client relations. Brandon has 10 years of professional experience in project management.

Education and Certifications:

Bachelor of Science in Environmental Studies & Agriscience, Michigan State University, 2012

Relevant Skills and Experiences:

Program design and implementation, client relations, data management, performance metrics tracking, quality assurance, vendor management, project management, program design consulting, data analytics.

Location:

Warren, MI

Lauren Chapman, Program Coordinator

***Rebate Program Experience *Project Management Experience**



Lauren serves as Program and rebate Coordinator for both the BWL Hometown Energy Savers and the U.P. Energy Innovations Collaborative (U.P. EIC) programs. In addition, Lauren coordinates residential energy efficiency programs and has developed and implemented the High Efficiency Products rebate program for eight utilities across Michigan. Lauren manages rebate administration across the MEO portfolio and has ample experience in direct install projects, community outreach events, and day-to-day customer service. Lauren's passion for energy sustainability and access for all continues to inspire their work and dedication to all customers.

Education and Certifications:

Bachelor of Arts in Women's and Gender Studies, Michigan State University, In Progress

Bachelor of Arts in Religious Studies, Michigan State University, In Progress

Relevant Skills and Experiences:

Program coordination, energy waste reduction measures, rebate processing, compliance monitoring and tracking, project verification, direct install projects, community outreach, customer service, partnership development, report generation.

Location:

East Lansing, MI

Angela Marez, Residential Program Manager

***Rebate Program Experience *Project Management Experience**



Angela currently serves as a Residential Program Manager for Michigan Energy Options energy waste reduction programs. Prior to this role, she served as a multi-family Property Manager with experience in LITHC tax-credit, MSHDA and Rural Development programs. She has a track record of optimizing program performance and prioritizing multiple complex projects simultaneously.

Education and Certifications:

Fair Housing Certification, Red Oak Management, 2020, 2019, 2018, 2017

Housing Compliance Specialist Certification, E & A Team, 2019

Relevant Skills and Experiences:

Program planning and implementation, multi-family property management, logistical coordination, inventory tracking, data reporting, program analysis, targeted outreach, KPI tracking, program budgeting.

Location:

Grand Ledge, MI

A.3 History of Firms

Elevate is a nonprofit organization working at the nexus of energy efficiency, sustainability, and affordable housing for over 23 years. Elevate is based in Chicago and works nationally, with programs in Michigan, Wisconsin, Missouri, Oregon, and California. Elevate seeks to create a world in which everyone has clean and affordable heat, power, and water in their homes and communities – no matter who they are or

where they live. Making the benefits and services of the clean energy economy accessible to everyone is how we fight climate change while supporting equity.

Michigan Energy Options (MEO) is a nonprofit whose mission is to guide communities toward being more sustainable and resilient through the adoption of energy efficiency and renewable energy. MEO provides unbiased expertise, research, and results-driven programs by working collaboratively with local governments, businesses utilities and community leaders. Since 2012, MEO and partners have implemented Energy Efficiency and Renewable Energy Rebate programs for municipal and cooperative utilities across Michigan. MEO currently administers rebate programs for the Lansing Board of Water and Light, the Village of L'Anse, Village of Baraga, Crystal Falls, Norway, Gladstone, Negaunee and the Ontonagon REA.

Elevate and MEO have collaborated on projects for over 9 years, building a close working relationship and a history of successful projects together. MEO will be the primary provider of rebate administrative services, as they have formed a nimble and cost-effective rebate processing operation, while Elevate will provide overall program oversight, reporting, present at local events, and build out the tracking system, website, and graphic designed materials. MEO's approach to scaling resources is to cross-train employees so when all hands on deck are needed to meet timelines they can quickly adjust. Elevate will also work with MEO to have cross-trained capacity to ensure the rebate program provides quick turnarounds of customer rebates and works with incomplete rebate applications to collect the needed information.

A.4. Customer Service and Continuous Process Improvement

Our team's approach to customer service is grounded in responsiveness and a dedication to meet and exceed program expectations. Our trained team prioritizes open lines of communication, ensuring that all parties are well-informed throughout each phase of the program. We aim to resolve any issues or inquiries with a first response within 24 hours or by the next business day, targeting a full resolution within 48 hours.

Our customer-centric approach extends to active engagement with both contractors and city representatives. By maintaining a robust contractor engagement program and open channels with city officials, we ensure the smooth operation of the rebate program from application to fulfillment. Communication options such as training sessions, webinars, and one-on-one interactions provide our team and contractors with the knowledge and resources needed for effective customer service.

Continuous Process Improvement

We are committed to continuous improvement through a data-driven approach. We regularly analyze program metrics and participant feedback to identify areas for improvement. We leverage our experience from past projects to make regular updates to the program, making sure it meets community needs and achieves goals. This commitment to improvement allows us to adapt and scale our services efficiently, optimizing the program for high impact and customer satisfaction.

A.5. Relevant Experience and Skills

The Elevate and MEO team not only has extensive expertise in electrification, energy efficiency, and renewable energy but also has a proven track record in planning, designing and operating rebate and efficiency programs.

As shown above, each team member's skills and experiences are aligned with the goals and objectives specified in the in the scope of work as described in section C1. Our team's collective expertise in program development, data analytics, community engagement and, importantly, rebate processing positions us uniquely to deliver a program that meets and exceeds expectations.

B. Past Involvement with Similar Projects

Utility Programming Work

LANSING BOARD OF WATER & LIGHT PROGRAM AND REBATE ADMINISTRATOR: 2012-PRESENT



Michigan Energy Options and partners have worked with the Lansing Board of Water & Light (LBWL) since 2012, serving as the implementation and rebate administrator for their Hometown Energy Savers Programs. In this role, the team has been responsible for the end-to-end management of the program, from contractor enrollment and engagement to incentive processing and fulfillment. Over the last

decade, we have set and exceeded goals, suggested and adopted new electrification measures, streamlined the application process, ensured fast and accurate rebate distribution, and maintained high levels of customer satisfaction. As this is an ongoing program, we continually assess and adapt the programs based on monthly and yearly numbers to make sure it meets community needs and established program goals.

WPPI ENERGY: ENERGY INNOVATIONS COLLABORATIVE PROGRAM AND REBATE ADMINISTRATION: 2022-PRESENT



MEO contracted with WPPI in May of 2022 to implement a new collaborative rebate program for six municipal utilities and one cooperative utility in the Upper Peninsula of Michigan. Drawing on our decade of experience with the LBWL, we worked with WPPI and partner utilities to establish a new program from website and marketing to

rebate design and implementation. Our scope of services includes residential and commercial beneficial Electrification, efficiency and solar programs, contractor outreach, income-qualified programs, and rebate processing.

MICHIGAN ELECTRIC COOPERATION ASSOCIATION ENERGY WASTE REDUCTION PROGRAMS: 2012-2021; APPLIANCE RECYCLING 2021-PRESENT



MEO worked with partner Slipstream on the MECA Energy Optimization (EO) Program from 2012-2021, serving a mix of municipal and cooperative utilities across both peninsulas of Michigan. Our role primarily involved field staffing for income-qualified services, retail lighting, and appliance recycling programs. Since the EWR program

sunset in 2021, MEO has continued to provide Appliance Recycling services for former MECA EWR members on a year-to-year contractual basis.

RELEVANCE TO REBATE PROGRAM

MEO's extensive experience that we have gained through our longstanding partnership with the Lansing Board of Water & Light, MECA EWR programs, and subsequent implementation of the UPEIC program makes us well suited to implement Ann Arbor's rebate program. Our track record of end-to-end program management including contractor engagement, incentive/rebate processing and customer service directly correlate with the requirements and expectations of Ann Arbor's Rebate Program.

CLIENT REFERENCES

Anna Munie
Manager Carbon neutrality Programs
Lansing Board of Water & Light
517-702-6456

Anna.munie@lbwl.com

Brett Niemi, C.E.M.
Senior Energy Services Manager
WPPI Energy
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bniemi@wppienergy.org

Traverse City Light and Power Climate Action Plan



Michigan Energy Options and Elevate collaborated with 5Lakes Energy and Next Energy on the recent Traverse City Light & Power Climate Action Plan. MEO and Elevate spearheaded the program consulting on electrification and energy efficiency rebate programs, leveraging our expertise in these areas to move the plan forward. The final plan lays the groundwork for Traverse City Light and Power to move toward a low carbon future. The collaborative efforts of the team reflected in the plan demonstrates the how partnerships can help advance energy efficiency, electrification and sustainable program planning in a community.

RELEVANCE TO REBATE PROGRAM

Our combined role in consulting on electrification and rebate programs for the Traverse Climate Action Plan, showcases our capability to design rebates that are based on their climate impact. While this was a planning-based effort, it established a novel methodology for how electrification rebate can be evaluated and shows how our team is effective in collaborating with multiple stakeholders and our ability to lay the base for a successful program rollout.

Client Reference

Douglas Jester
5 Lakes Energy
djester@5lakesenergy.com
517-337-7527

City of Ann Arbor Affordable Housing Grants



The City of Ann Arbor partnered with Elevate to administer \$300,000 through a pilot Low-Income Sustainability Grant Program (LISG). Through this partnership, Elevate worked with Ann Arbor Housing Commission and Avalon Housing to identify eligible building upgrades that would result in a reduction of operational building carbon emissions, in alignment with Ann Arbor's A2Zero carbon-neutrality initiatives. Through LISG, Ann Arbor Housing Commission were able to receive a new energy efficient chiller for their Baker Commons

Housing, a 64-unit building. Similarly, Avalon Housing were able to provide window replacements/upgrades to 4 separate properties.

Relevance to Rebate Program

This program identified some key barriers to multifamily properties utilizing grants to make improvements that result in emissions reductions. We will leverage our learnings from this program to assist in the design of rebates that will target low-income multifamily properties in Ann Arbor.

Client Reference

Joe Lange, Energy Analyst

City of Ann Arbor, Office of Sustainability and Innovations
301 East Huron St., Ann Arbor, MI@
jlange@a2gov.org
734.794.6000

ComEd Electrification Program



Elevate has a long and successful history partnering with ComEd to support energy efficiency and demand response, as well as other services, since 2003. Elevate was the Implementation Contractor for three of ComEd's energy efficiency offerings: the Income Eligible Multifamily Savings program, the Public Housing Energy Savings program, and the Nonprofit Organizations Offerings from 2017 to 2021.

In the last year, Elevate has partnered with the Chicago Bungalow Association (CBA), a community-based organization, and leveraged multiple philanthropic funding sources to complete single family full electrification retrofits under the ComEd's Emerging Technology electrification initiatives. Elevate works with community-based organizations like CBA to conduct meaningful, on-the-ground customer engagement and reach homeowners and potential program participants in specific target communities that have high density of older 1–4 unit housing, which is proven to be energy intensive and a great opportunity for energy savings and carbon reduction. This successful partnership with ComEd was highlighted in a ComEd news release, where Elevate completed 49 of the 56 projects mentioned. Learnings from this program have led to the creations of full-scale electrification programs by both ComEd and the City of Chicago, which will provide rebates, incentives, and a one-stop-shop service to households that will help them along the entire process of electrification.

Relevance to Rebate Program

Elevate's work with ComEd and this electrification program showcases our ability to leverage funding in collaboration with community partners to help homeowners and specific target communities on the path to electrification. We will use the lessons learned from this partnership project to inform the Community Climate Action Residential Rebate program's development, in regard to creating an outreach plan alongside OSI to ensure that services are reaching the targeted households.

Client Reference

John Moon, Vice President
Wells Fargo
464 California St., San Francisco, CA
john.moon@wellsfargo.com
413-396-4424

Madison Efficiency Navigator



The Efficiency Navigator is a Madison, Wisconsin based program facilitated by Elevate, in partnership with the City of Madison and Sustain Dane. The program helps small to medium-size multi-family housing become more efficient and resilient while reducing the operation costs to remain affordable. The program goals of the Madison Efficiency Navigator are to 1) foster innovations to help preserve affordable workforce housing, 2) address the intersection of environmental, social, and economic justice for cost-burdened residents, and 3) reduces energy and water demand in the existing Madison building stock to tackle the effects of climate change. The program offers building efficiency assessments to identify energy, water and solar opportunities for multi-family housing, as well as step-by-step technical support to navigate

efficiency programs, incentives and contractors. The program offers incentives to buy-down project costs if the owner agrees to preserve the affordability of rents for a specified time period.

Throughout the implementation of the Efficiency Navigator data shows that having supportive navigation program motivated property owners to pursue and complete clean energy projects they would have otherwise neglected. In total, the Madison Efficiency Navigator program has completed 88 assessments, improved ventilation in six buildings, and implemented 67 low carbon projects.

Relevance to Rebate Program

The Madison Efficiency Navigator represents Elevate's ability to service multi-family buildings in regard to assessment, clean energy project development, and step-by-step technical support, while providing incentives that require owners to maintain affordable rents.

Client Reference

Clair Schaefer Oleksiak, Executive Director
Sustain Dane
821 East Washington Ave 3rd Floor, Madison, WI
claire@sustaindane.org
608-285-2454

C. Proposed Work Plan

C.1. Management and Scheduling

Effective management and scheduling are important for the successful execution of the Ann Arbor Rebate Program. Our team brings an array of experience in managing energy programs to ensure timely and accurate delivery of services. Our approach combines project management with flexible scheduling of services and coordination with the HEA program to adapt to the evolving needs of the program.

Our collaborative relationship with Elevate, the City of Ann Arbor and the Home Energy Advisor (HEA) Program will further enhance the efficiency of program management. Regular meetings and performance reviews will serve as checkpoints to assess the program's progress and make necessary adjustments. This approach will ensure that the Rebate Program remains responsive and aligned with the city's sustainability goals.

In the following sections, we elaborate on the aspects of program management, detailing our approach for vendor selection, project and participant eligibility, application and rebate processing, customer service, and more.

A. PROGRAM ESTABLISHMENT

Elevate and MEO will submit a recommended program design and supporting documentation within the stipulated 60-day period. This design will be developed in collaboration with City representatives to ensure alignment with city objectives.

i. Approved Vendor Requirements and Registration

- i. A process for approving vendors as qualified to receive rebates

To ensure that only qualified vendors participate in the Rebate Program, Elevate and MEO will implement a comprehensive vendor approval process.

- **Preliminary Screening:** Initial vetting based on predefined criteria such as business history, financial stability, and relevant experience.

- **Documentation Review:** Evaluation of essential documents including licenses, insurance certificates, and accreditations.
 - **Quality Assessment:** Site visits or interviews may be conducted to assess the vendor's capabilities and adherence to quality standards.
 - **Final Approval:** Vendors who meet all criteria will be granted approval to participate in the Rebate Program.
- ii. A process for auditing and expelling vendors that do not meet program requirements.

To maintain the integrity of the Rebate Program, our team will institute an ongoing auditing process.

- **Random Audits:** Periodic audits of vendor operations and completed projects.
- **Performance Metrics:** Continual monitoring of vendor performance against key indicators such as customer satisfaction, timely delivery, and compliance with program guidelines.
- **Expulsion Criteria:** Clear guidelines will be established to identify grounds for expulsion, such as repeated quality failures or compliance breaches.
- **Notification and Appeal:** Vendors subject to expulsion will be notified in writing and will have the opportunity to appeal the decision.

ii. Project and Participant Eligibility Criterion

i. Procedures to Ensure Coordination with the HEA Program

To align the Rebate Program with the Home Energy Advisor (HEA) Program, our team will implement the following procedures, designed to enhance efficiencies:

- **Data Sharing Agreement:** Establish a secure data-sharing mechanism between the Rebate Program and the HEA Program to exchange necessary information.
- **Joint Meetings:** Regularly scheduled meetings between the two programs' coordinators to discuss alignment opportunities.
- **Promotion:** Utilize each program's marketing channels to promote the other, ensuring wider community outreach.

Elevate is submitting a proposal to administer the Home Energy Advisor program and believes a single administrator for both the Rebate and HEA programs would result in significant administrative efficiencies, costs savings, and a seamless customer experience with these programs. However, we are committed to working with the HEA program regardless of which entity is selected to administer the program.

ii. A Process for Accepting and Reviewing Applications for Rebates

Our team will leverage our existing incentive processing and fulfillment systems to manage rebate applications:

- **Submission:** Multiple submission options will be provided to ensure all applicants are able to easily access the rebate program. Applicants will have the option to apply for rebates electronically via an online application or use a traditional paper application. Mail, email and fax options will be provided for alternative submission options.
- **Application Review:** A dedicated team will be responsible for reviewing applications against the program's eligibility criteria.
- All applications are date stamped, scanned when needed, and logged electronically within 24 hours of receipt to ensure accurate cycle time tracking and document retention.

- All applications are reviewed within 7-10 days of receipt for accuracy, customer eligibility, and completeness.
- The team will correspond directly with customers and/or contractors to collect missing information. Two attempts to contact the applicant will be made. Applications will be rejected after a set number of days, to be determined in partnership with OSI, if the applicant does not respond and/or fails to provide the missing information.
- Applicants will be notified of the decision within 10 business days, with explanations provided for any rejections.

iii. An Estimate of the Number of Eligible Rebates

Based on our decade of experience and market research, our team will suggest and provide an estimate of the number of rebates available in each category such as E-bikes and heat pumps. The estimates will be finalized in consultation with City representatives and the HEA administrator to align with the program's goals and budget

iii. Project and Participant Verification

i. A Process for Verifying Income-Qualified Participants

To ensure that income-qualified participants are accurately identified and can benefit from the Rebate Program, our team will implement the following procedures:

- **Document Submission:** Applicants will be required to submit income verification documents such as tax returns, pay stubs or self-attestation forms as agreed upon by city and HEA administration.
- **Income Thresholds:** In conjunction with the City, our team will establish income thresholds based on local or federal guidelines to categorize income-qualified participants. We will make sure these thresholds align with IRA and other incentive opportunity requirements.

ii. A Process for Verifying Applications

To maintain the integrity of the Rebate Program, our team will institute a multi-layered application verification process, which will be adapted and integrated into our current incentive fulfillment framework:

- **Initial Screening:** Applications will undergo an initial screening to filter out incomplete or ineligible submissions.
- **Detailed Review:** Our fulfillment team will conduct a detailed review to ensure that the applications meet all program requirements.
- **Quality Checks:** Random quality checks will be conducted to ensure the accuracy of the verification process.

iii. A Waitlist Process with Associated Notification Protocols

In the event that the program category reaches its capacity, our team will manage a waitlist for eligible but currently unaccommodated applicants:

- **Waitlist Enrollment:** Eligible applicants will be enrolled and waitlisted if the program is at capacity.
- **Notification:** Applicants added to the waitlist will be notified via email or other agreed-upon communication method.
- **Prioritization:** The waitlist will be managed based on predefined criteria, such as application date or specific needs as decided upon by city and HEA administrators.
- **Status Updates:** Regular updates will be provided to waitlisted applicants regarding their status and expected timeframe for inclusion in the program.

iv. Marketing and Consumer Protection Requirements

To ensure effective program outreach and safeguard consumer interests, our team will collaborate closely with City and HEA Program administrators to identify optimal marketing channels and strategies, including leveraging city communication platforms and contractor networks.

Marketing Strategies may include:

- **Targeted Outreach:** Utilizing data analytics, we will identify key demographics to target for program participation.
- **Multi-Channel Marketing:** In line with budgeting, our team will employ a mix of online and offline marketing channels such as social media, possible direct mail, and presenting at community events.
- **Partner Collaborations:** Leverage relationships with HEA and other city programs, local organizations, institutions and contractor networks to spread awareness about the Rebate Program.

Consumer Protection Measures

- **Transparency:** All marketing materials and program documentation will be crafted with the city and HEA administrators to ensure clarity and full disclosure of program requirements and benefits. Only approved marketing materials and channels will be utilized.
- **Data Security:** Cybersecurity measures will be in place to protect consumer data.
- **Complaint Resolution:** Our administrative team will be available to handle questions and complaints for issue resolution.
- **Monitoring:** We will provide ongoing monitoring of marketing and communications efforts to ensure they meet the standards of the City of Ann Arbor.
- **Feedback:** We will establish mechanisms such as surveys for gathering consumer feedback on both the Rebate Program and marketing efforts, allowing for ongoing improvements.

v. Project Submission, Review, and Approval Process

i. Applications for Rebates

Our team will create and utilize a standardized application form for rebate submissions, ensuring uniformity and ease of processing. This form will be made available both online and in printable formats for mail-in submissions.

ii. Online and Offline Application Channels

- **Online Portal:** Elevate and MEO, will establish a secure, user-friendly online portal for electronic submissions.
- **Offline Alternatives:** For those with limited internet access, phone-based application assistance, mail-in, and fax options will be provided. Detailed guides on how to apply using these methods will be made available.

iii. Application Review and Notification Process

- **Application Receipt:** All applications are date stamped, scanned, and logged electronically within 1 business day of receipt to ensure accurate cycle time tracking and document retention.
- **Initial Assessment:** Each application will undergo an initial screening to check for completeness and basic eligibility. Applications that fail this screening will move to the notification process, where our fulfillment team will attempt to retrieve the missing information from the applicant.

- **Detailed Review:** Applications passing the initial screening will be subjected to a comprehensive review by a dedicated committee. Equipment invoices and spec sheets will be reviewed to ensure eligibility. Applications will only be approved if all requirements are met.
- **Notification:** Applicants will be notified of the outcome (award or decline) within a specified timeframe. In case of declines, a clear explanation will be provided, and applicants will be given an option and timeframe to respond and/or provide additional documentation.

vi. Rebate Invoice and Payment Process

- i. Working with City representatives to design process for rebate distribution and invoicing.

Our team will work in close coordination with City representatives to design a streamlined and efficient process for rebate distribution and invoicing.

- Our team will utilize our existing processes as a starting point. We will work closely with City representative to define any additional requirements and parameters of the rebate distribution process. These will be adopted prior to implementation.
- We will work with the City to establish a timely process for program implementation invoicing.

- ii. Timely Issuance of Rebates: Procedure to ensure that rebates are issued within 14 days, at a minimum, of a successful application and/or proof of payment.

Our team will work to establish internal protocols to ensure that rebate payments are issued within 14 days following a successful application and/or proof of payment. To accomplish this we will:

- **Tracking:** Utilize tracking systems to monitor the status of each application from submission to payment.
- **Payment Processing:** Prepare and process check runs for complete incentive applications weekly.
- **Reporting:** Reporting and other quality assurance processes will be reviewed frequently to ensure the 14-day commitment is being met. The program process will be altered and adapted as needed to ensure quick and reliable application review and rebate processing.
- **Regular Meetings:** Meetings will be held with city representatives to discuss program updates including the 14-day benchmark.

vii. Rebate Tracking, Verification, and Reporting Procedures

- i. Methodology for Tracking, Verifying, and Reporting Rebates

To ensure an organized and open rebate process, we will implement procedures for tracking, verifying, and reporting rebates. This will involve:

- **Data review:** Implement routine data checks to validate the information collected and entered during the application and rebate issuance processes.
- **Automated Verification:** Utilize automated tools to verify the eligibility and documentation of rebate applications.
- **Oversight:** Include a layer of manual review to address complex cases that cannot be automated.
- **Time-Stamped Tracking:** Major steps in the rebate process will be time-stamped in the system for accountability.
- **Reporting:** We will establish a framework for generating reports that include key performance indicators (KPIs), processing times, and other relevant metrics as directed by the city.

- ii. Public-Facing Dashboard or Platform

Elevate and MEO will collaborate with City representatives to develop a public-facing dashboard that provides updates on rebate availability and impact metrics. This dashboard may include:

- **Platform and Features:** A platform that aligns with the City's IT and data policies, featuring real-time updates on rebate availability and impact metrics such as energy savings and greenhouse gas reductions.
- **User Experience and Security:** Ensuring the dashboard is user-friendly, ADA-compliant, and adheres to stringent data security protocols.

viii. Complaint Management Protocol

Our team will establish a comprehensive Complaint Management Protocol to ensure timely and effective resolution of any complaints. This includes:

- **Immediate Response:** All complaints and issues will receive a first response within 24 hours or the next business day, mirroring our proven approach in other rebate programs.
- **Situation Assessment:** Our team will review all relevant background information and consult program guidelines and terms and conditions to assess the situation accurately.
- **Tiered Resolution:** Disputes can range from simple misunderstandings to complex issues. Depending on the severity, the program manager will intervene to facilitate a swift resolution.
- **Collaborative Review:** If a resolution isn't achieved within two business days, we will contact City representatives for collaborative problem-solving. Necessary documentation, such as email correspondence and customer requests, will be gathered for this review.
- **Elevated Issues:** In special cases where standard procedures don't suffice, the issue will be escalated to City authorities for an override and process exception approval.
- **Timely Resolution:** Our team aims to resolve all complaints within five business days, striving to maintain an excellent long-term relationship with customers.

ix. Web-Based Resources for Program Information and Access

In collaboration with the City and HEA Program, we propose the following approach for web-based resources:

- **Collaborative Oversight:** While the City may host the website, we will work closely to monitor and refine its content, ensuring alignment with program goals.
- **User-Friendly Design:** In consultation with the City, and the HEA program, we'll recommend landing pages that are intuitive and easy to navigate, presenting specific program categories like ENERGY STAR Appliances and Heating & Cooling.
- **Comprehensive Information:** Lists of available rebates, specifications, and FAQs and a public dashboard will be developed and prominently displayed. The dashboard will provide information on the number of available rebates, successful applications, and program impact.
- **Cross-Promotion:** We will integrate cross-program details from the HEA program's offerings into the City's landing pages to provide a unified customer experience.
- **Targeted Marketing:** Vanity URLs can be co-created to serve as targeted landing pages for various marketing materials.
- **Data-Driven Decisions:** Website analytics will be reviewed regularly to measure the effectiveness of marketing efforts and inform any necessary adjustments to the program.
- **Regular Updates:** Information sharing will occur at regular intervals, possibly during monthly team meetings, to provide key insights for marketing and program enhancements.

x. Lessons Learned and Best Practices

In administering rebate programs across the state, several best practices have emerged that we intend to bring to the Ann Arbor Rebate Program. First, a streamlined application process is essential. To ensure ease of participation, we advocate for a simplified, easy-to-understand application form that minimizes barriers to participation.

Second, we propose aligning the program requirements closely with other existing rebate programs to minimize confusion among contractors and residents who may have participated in other utility rebate programs. Consistency in requirements across programs simplifies participation and maximizes uptake. This also includes the expected State of Michigan HOMES and HEEHRA rebate programs.

Third, maintaining open lines of communication among all stakeholders is crucial. Regular team meetings will ensure program alignment and adaptability, allowing the program to be responsive to community needs.

Fourth, data-driven decision-making will inform program adjustments. Regular analysis of program metrics will guide any necessary changes, ensuring ongoing effectiveness.

xi. Recommendations on equipment, project, vendor, and participant eligibility requirements.

We will collaborate directly with the OSI to formulate and present well-reasoned recommendations regarding equipment, project, vendor, and participant eligibility requirements for the Rebate Program. We will align our suggestions with initial eligibility criteria set forth by OSI, while also being prepared to adapt these criteria to better serve the specific needs and objectives of the Ann Arbor community.

C.2. Data and Materials Delivery

Per the requirements of the Scope of Services, the first set of data and materials delivered to OSI will be the recommended program design and supporting documentation within 60 calendar days of executing the professional services agreement. We will work with OSI to co-design the program and set interim data and material delivery dates to achieve a mutually agreed to final design. Elevate's Program Manager and MEO's Program Manager will be the primary points of contact with OSI during this time. Once the design is agreed to, the startup phase will begin with a clear timeline of data and material delivery and final approval before the program is made available to the public. All process flows, rebate applications, marketing materials, website content, written policies, and draft communications and call scripts will be provided to OSI for approval.

Once in operation, we will provide OSI access to an internal-facing dashboard in Salesforce, as well as access to any other process tracking documents hosted on our SharePoint site. These will provide the real-time internal metrics as rebates are processed. We will also meet monthly and provide regular progress reports, present new or expected changes in content for public-facing materials, discuss and present any suggested changes in processes and timelines for moving to new operating standards, and any other data or materials that OSI requires.

We will work with OSI to determine the Rebate Program's role in income verification and documentation, and how it interacts with the Home Energy Advisor program. If the Rebate Program is required to conduct income verification and collect documentation, this documentation will be stored on a secure site, which may exclude OSI access for privacy protection reasons. Our team will indicate that an income-qualified applicant has provided documentation and the type of document submitted.

Overall scheduling of data and materials delivery will be closely coordinated between the Rebate Program Manager and the City's representative, to ensure a direct line of communication and operational structure for delivery on agreed upon timelines and formats.

C.3. Communications and Coordination Tools

TEAM COMMUNICATIONS

Microsoft 365 is recommended as the main tool for communication and coordination for the Rebate Program. The 365 software offers a cloud-based service that allows for cross-organizational communication and content management through its SharePoint application. As the Microsoft 365 software is currently being used by Elevate, MEO, and the City of Ann Arbor it makes sense that the Rebate Program continues this protocol. This will enable MEO and Elevate to directly communicate with OSI, as well as have ease of access to SharePoint content between our organizations.

REBATE PROCESSING COMMUNICATION

For rebate processing, our fulfillment team will utilize several communication methods to ensure efficiency in communication with participants. We propose using the secure HEA website and help center, where applicants can upload required documentation, rebate applications and submit call requests to staff. Notifications will be sent via email at key milestones, such as when an application is received, and when it has been approved or requires additional information. For participants who lack web access, mailed applications will be accepted. In the case of missing emails, phone calls may be made to collect missing information required for final approval.

C.4. Data Management and CRMs

CRM

Salesforce is a cloud-based software that provides customer relationship management features and applications focused on sales, customer service, marketing, and data analytics. Regarding this program, Salesforce would be used to house participant information and track interaction with each household that engages with the Rebate Program. It could also be integrated into Home Energy Advisor program to have a single platform that tracks interactions with city residents.

Elevate has a highly experienced Salesforce team and will create a system that optimizes the ability of the database to produce detailed internal reports as well as public-facing metrics dashboards on the Rebate website.

SECURE FILE STORAGE

SharePoint will be used as the main source of documentation. It is an online document management system. The cloud storage system allows for instant backups of documents and files and has the ability to be both secure and keep confidential information safe as well as accessible to individuals through link sharing. This system is also used by the City of Ann Arbor OSI, which enables easy integration. Each participant in the Rebate Program will have their own file that includes a cross-link to their Salesforce profile, where interactions are logged, as well as all rebate applications, complaint resolution documentation, and income verification documentation which may be housed separately for privacy protection.

C.5. Outreach and Engagement

Our team will work to effectively engage both retailers and contractors, as well as collaborate with the city for a unified marketing strategy.

OUTREACH TO RETAILERS AND CONTRACTORS

- **Direct Communication:** Leveraging our utility rebate processing experience, we plan to initiate direct outreach to local retailers and contractors through email, phone, and in-person visits to educate local partners on the rebate program.

- **Training Sessions:** We'll host informational webinars and in-person training sessions to educate contractors and local retailers about the program details, the types of products that qualify, and how to guide customers to and through the application process.
- **Collateral Materials:** We'll collaborate with the city and HEA administration on promotional material options, such as rebate guides, for retailers and contractors. This not only increases visibility but also serves as an immediate resource for potential program participants.
- **Regular Updates:** Our team will work to keep our contractors and retailers updated on program changes and any new opportunities.

COLLABORATIVE MARKETING PLAN WITH THE CITY

Our team proposes a closely collaborative approach with the city and the HEA program to jointly craft a marketing plan that increases the reach of the rebate program. Our seasoned teams would envision a variety marketing options, including joint press releases, social media campaigns, and community events. These jointly created options and methods would serve to engage the public with local knowledge, build trust, and ensure the program's successful implementation. In addition, our overall strategy can be designed for scalability and new program integration, potentially accommodating future expansions such as a commercial rebate program.

C.6. Scaling Workloads

As the Ann Arbor Rebate Program is in its early stages, initial participation levels may be modest. However, as awareness builds through marketing efforts, contractor training, and coordination with the HEA program, we anticipate a steady increase in demand for services.

MEO and Elevate are well-equipped to adapt to these fluctuations in workload. Both organizations have a flexible staffing model that includes cross-trained employees capable of managing multiple aspects of work across a variety of programs. This enables us to efficiently allocate resources where they are most needed, without compromising service quality.

Our proactive approach to monitoring program metrics will allow us to see workload changes and make timely staffing adjustments. This agility in resource allocation ensures that we can meet the evolving needs of the rebate program from launch through its growth phases.

Elevate is also bidding to administer the Home Energy Advisor program, and has identified MEO as a Network Partner to assist with administrative workloads. We expect to cross-train and collaborate across both programs, if selected as the dual administrator.

C.7. Working Relationship with City Staff

Elevate and Michigan Energy Options are committed to expanding its relationship with the City of Ann Arbor Office of Sustainability and Innovations. Elevate's Program Manager will be the main point of contact for the Community Climate Action Residential Rebate program. They will foster a close working relationship with the OSI program manager and MEO program manager to operate the program, plan for any needed changes to program structure or day-to-day operations and provide up-to-date information on the progress of the program. The Program Manager will work with OSI and MEO to establish consistent points on contact and communication, as well as coordinate with other OSI-led programs to ensure potential rebate applicants are directed towards the rebate program and rebate applicants are directed towards OSI-led programs like HERD, Green Rentals, and Benchmarking.

C.8. Our Team's Philosophy

Elevate and Michigan Energy Options seek to create a just and equitable world in which everyone has clean and affordable heat, power, and water in their homes and communities — no matter who they are or where they live. Our mission is to guide communities toward being more sustainable and resilient through the adoption of energy efficiency and renewable energy. Our programs, policy agenda, and partners reflect this commitment.

Making the benefits and services of the clean energy economy accessible to everyone is how we fight climate change while supporting equity. We design and implement programs that reduce costs, protect people and the environment, and ensure the benefits of clean and efficient energy use reach those who need them most.

We want to work with everyone we can to help them reduce their energy costs and improve their quality of life — from homeowners, renters, and building owners, to nonprofit organizations, utilities, and municipalities. Our team builds strong connections in the places we work and delivers high-quality programs and services that contribute to healthy, thriving communities.

The Community Climate Action Residential Rebate Program aligns with our team's core value to make the transition to clean energy and resiliency accessible for all. Making the process to access information, guidance, redistributing funds, and build partnerships is what we do. We know the concepts of decarbonizing a home can be daunting, and even a climate-motivated person may not know the best place to start. In all our programming, we meet people where they are and help them along in their journey with unbiased, evidence-based information and guidance that we believe is in their best interests.

D. Fee Proposal

The Fee Proposal has been separately submitted, per RFP direction.

E. Authorized Negotiator

Abigail Corso, Chief Strategy Officer



Abigail.corso@elevatenp.org

608.807.1093

F. Attachments

Attachments follow, along with Resumes.

**ATTACHMENT B
LEGAL STATUS OF OFFEROR**

(The Respondent shall fill out the provision and strike out the remaining ones.)

The Respondent is:

- A not for profit corporation organized and doing business under the laws of the state of Illinois, for whom Abigail Corso bearing the office title of Chief Strategy Officer, whose signature is affixed to this proposal, is authorized to execute contracts on behalf of respondent.*

*If not incorporated in Michigan, please attach the corporation's Certificate of Authority

- ~~• A limited liability company doing business under the laws of the State of __, whom _____ bearing the title of __ whose signature is affixed to this proposal, is authorized to execute contract on behalf of the LLC.~~
- ~~• A partnership organized under the laws of the State of __ and filed with the County of __, whose members are (attach list including street and mailing address for each.)~~
- ~~• An individual, whose signature with address, is affixed to this RFP.~~

Respondent has examined the basic requirements of this RFP and its scope of services, including all Addendum (if applicable) and hereby agrees to offer the services as specified in the RFP.



Signature

Date: September 25, 2023

(Print) Name Abigail Corso Title Chief Strategy Officer

Firm: Elevate Energy

Address: 322 S. Green Street, Suite 300, Chicago, IL 60607

Contact Phone 773-269-4037 Fax 888-335-3261

Email Abigail.corso@elevatenp.org



MICHIGAN DEPARTMENT OF LICENSING AND REGULATORY AFFAIRS CORPORATIONS, SECURITIES & COMMERCIAL LICENSING BUREAU

Date Received

MAY 25 2021

AC1

(FOR BUREAU USE ONLY)

This document is effective on the date filed, unless a subsequent effective date within 90 days after received date is stated in the document.

TransInfo:1 24694164-1 05/21/21

Chk#: 57999 Amt: \$20.00

ID: ELEVATE ENERGY

FILED**JUN 09 2021**

EFFECTIVE DATE:

**ADMINISTRATOR
CORPORATIONS DIVISION**

Name

Elevate Energy, Attention: Michelle Thoma-Culver

Address

322 S. Green Street, Suite 300

City

Chicago, IL 60607

State

ZIP Code

Document will be returned to the name and address you enter above.
If left blank, document will be returned to the registered office.

APPLICATION FOR CERTIFICATE OF AUTHORITY TO TRANSACT BUSINESS OR CONDUCT AFFAIRS IN MICHIGAN

For use by Foreign Corporations

(Please read information and instructions on the last page)

Pursuant to the provisions of Act 284, Public Acts of 1972 (profit corporations), or Act 162, Public Acts of 1982 (nonprofit corporations), the undersigned execute the following Application:

1. The name of the corporation is:

Elevate Energy

2. (Complete this item only if the corporate name in item 1 is not available for use in Michigan.)

The assumed name of the corporation to be used in all its dealings with the Bureau and in the transaction of its business or conducting of its affairs in Michigan is:

3. It is incorporated under the laws of Illinois

The date of its incorporation is April 26, 2001, and the term of existence

if other than perpetual is N/A (perpetual)

4. a. The address of the main business or headquarters office of the corporation is:

322 S. Green Street, Suite 300, Chicago, IL 60607

(Street Address)

(City)

(State)

(ZIP Code)

b. The mailing address if different than above:

(Street Address)

(City)

(State)

(ZIP Code)

5. The street address of its registered office in Michigan is:

2222 W. Grand River Ave, STE A Okemos, Michigan 48864
(Street Address) (City) (ZIP Code)

The mailing address of the registered office in Michigan, if different than above:

(Street Address or P.O. Box) (City) (ZIP Code)

The name of the resident agent at the registered office is: Registered Agents Inc.

The resident agent is an agent of the corporation upon whom process against the corporation may be served.

6. The specific business or affairs which the corporation is to transact or conduct in Michigan is as follows:

Elevate Energy is a not-for-profit corporation engaged in public education, research, and other programs to support energy efficiency and environmental sustainability.

The corporation is authorized to transact such business or conduct those affairs in the jurisdiction of its incorporation.

7. (To be completed by profit corporations only)

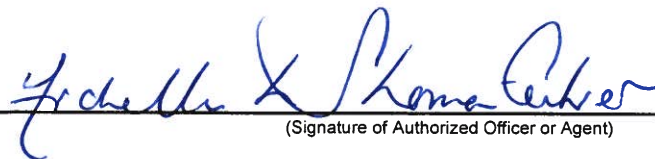
The total authorized shares of the corporation are: _____

8. If the applicant is a trust, please specify any powers or privileges possessed by the trust that are not possessed by an individual or a partnership.

N/A

Signed this 24th day of March, 2021

By



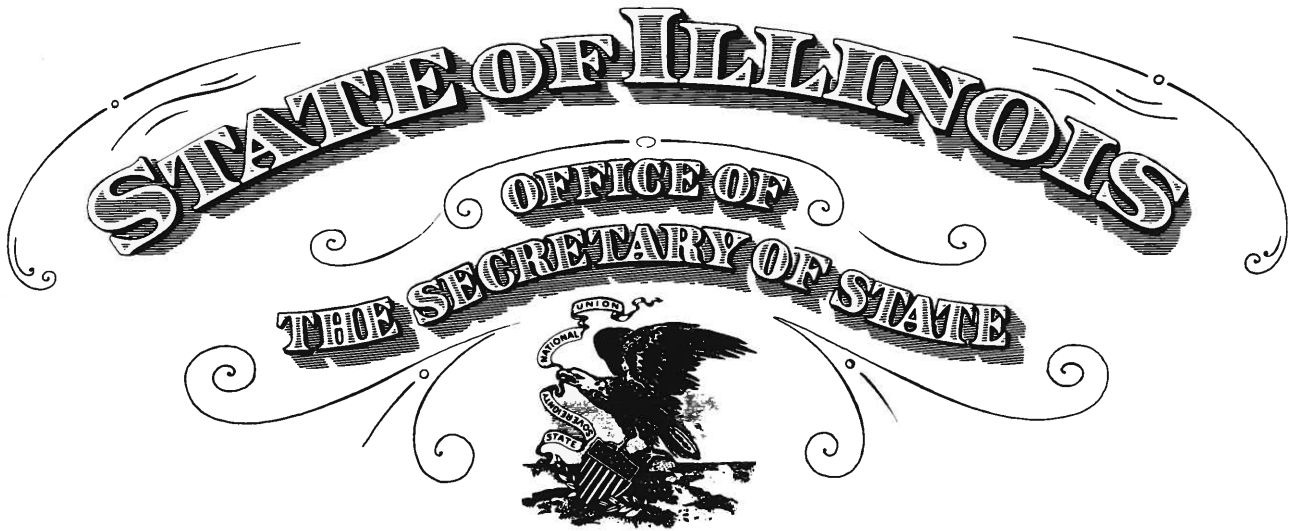
(Signature of Authorized Officer or Agent)

Michelle L. Thoma-Culver

(Type or Print Name)

File Number

6159-813-8



To all to whom these Presents Shall Come, Greeting:

I, Jesse White, Secretary of State of the State of Illinois, do hereby certify that I am the keeper of the records of the Department of Business Services. I certify that

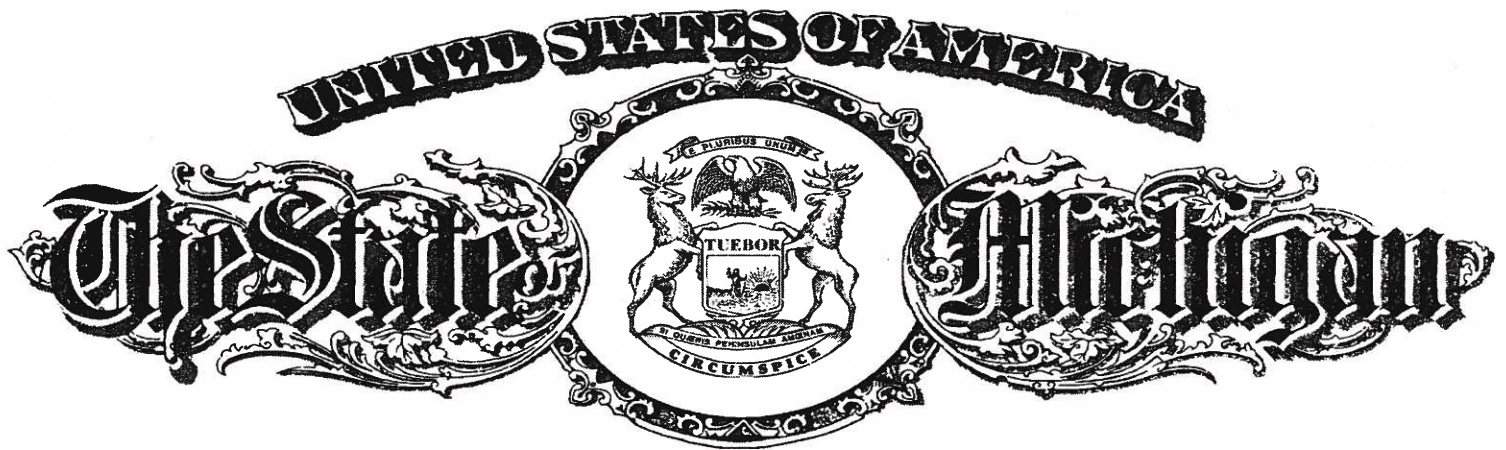
ELEVATE ENERGY, A DOMESTIC CORPORATION, INCORPORATED UNDER THE LAWS OF THIS STATE ON APRIL 26, 2001, APPEARS TO HAVE COMPLIED WITH ALL THE PROVISIONS OF THE GENERAL NOT FOR PROFIT CORPORATION ACT OF THIS STATE, AND AS OF THIS DATE, IS IN GOOD STANDING AS A DOMESTIC CORPORATION IN THE STATE OF ILLINOIS.



***In Testimony Whereof, I hereto set
my hand and cause to be affixed the Great Seal of
the State of Illinois, this 18TH
day of MAY A.D. 2021 .***

Jesse White

SECRETARY OF STATE



Department of Licensing and Regulatory Affairs

Lansing, Michigan

This is to Certify That

ELEVATE ENERGY

a nonprofit corporation existing under the laws of the state of Illinois

was validly authorized to conduct affairs in Michigan on the 9 day of June , 2021 in conformity with 1982 PA 162.

Said corporation is authorized to conduct in this state any affairs of the character set forth in its application which a domestic corporation formed under this act may lawfully conduct. The authority shall continue as long as said corporation retains its authority to conduct such affairs in the jurisdiction of its incorporation and its authority to conduct affairs in this state has not been surrendered, suspended, or revoked.

This certificate is in due form, made by me as the proper officer, and is entitled to have full faith and credit given it in every court and office within the United States.

In testimony whereof, I have hereunto set my hand, in the City of Lansing, this 9th day of June , 2021.

Linda Clegg

Linda Clegg, Director

Corporations, Securities & Commercial Licensing Bureau



GOLD SEAL APPEARS ONLY ON ORIGINAL



PROTECT PEOPLE &
PROMOTE BUSINESS

Thank you for filing with the Corporations Division.

The Identification Number assigned to your filing can be located at www.michigan.gov/corptentitysearch. Subsequent documents may be filed online with the Corporations Division at www.michigan.gov/corppfileonline using the CID (Customer Identification Number) and the PIN (Personal Identification Number) assigned to the entity. You may retrieve your CID/PIN by visiting our CID/PIN recovery page at www.michigan.gov/corppin.

ATTACHMENT C
CITY OF ANN ARBOR DECLARATION OF COMPLIANCE

Non-Discrimination Ordinance

The "non discrimination by city contractors" provision of the City of Ann Arbor Non-Discrimination Ordinance (Ann Arbor City Code Chapter 112, Section 9:158) requires all contractors proposing to do business with the City to treat employees in a manner which provides equal employment opportunity and does not discriminate against any of their employees, any City employee working with them, or any applicant for employment on the basis of actual or perceived age, arrest record, color, disability, educational association, familial status, family responsibilities, gender expression, gender identity, genetic information, height, HIV status, marital status, national origin, political beliefs, race, religion, sex, sexual orientation, source of income, veteran status, victim of domestic violence or stalking, or weight. It also requires that the contractors include a similar provision in all subcontracts that they execute for City work or programs.

In addition the City Non-Discrimination Ordinance requires that all contractors proposing to do business with the City of Ann Arbor must satisfy the contract compliance administrative policy adopted by the City Administrator. A copy of that policy may be obtained from the Purchasing Manager

The Contractor agrees:

- (a) To comply with the terms of the City of Ann Arbor's Non-Discrimination Ordinance and contract compliance administrative policy.
- (b) To post the City of Ann Arbor's Non-Discrimination Ordinance Notice in every work place or other location in which employees or other persons are contracted to provide services under a contract with the City.
- (c) To provide documentation within the specified time frame in connection with any workforce verification, compliance review or complaint investigation.
- (d) To permit access to employees and work sites to City representatives for the purposes of monitoring compliance, or investigating complaints of non-compliance.

The undersigned states that he/she has the requisite authority to act on behalf of his/her employer in these matters and has offered to provide the services in accordance with the terms of the Ann Arbor Non-Discrimination Ordinance. The undersigned certifies that he/she has read and is familiar with the terms of the Non-Discrimination Ordinance, obligates the Contractor to those terms and acknowledges that if his/her employer is found to be in violation of Ordinance it may be subject to civil penalties and termination of the awarded contract.

Elevate Energy

Company Name



Signature of Authorized Representative

September 25, 2023

Date

Abigail Corso, Chief Strategy Officer

Print Name and Title

322 S. Green Street, Suite 300, Chicago, IL 60607

Address, City, State, Zip

773-269-4037/abigail.corso@elevatenp.org

Phone/Email address

Questions about the Notice or the City Administrative Policy, Please contact:

Procurement Office of the City of Ann Arbor
(734) 794-6500

NDO-2

ATTACHMENT D **CITY OF ANN ARBOR** **LIVING WAGE ORDINANCE DECLARATION OF COMPLIANCE**

The Ann Arbor Living Wage Ordinance (Section 1:811-1:821 of Chapter 23 of Title I of the Code) requires that an employer who is (a) a contractor providing services to or for the City for a value greater than \$10,000 for any twelve-month contract term, or (b) a recipient of federal, state, or local grant funding administered by the City for a value greater than \$10,000, or (c) a recipient of financial assistance awarded by the City for a value greater than \$10,000, shall pay its employees a prescribed minimum level of compensation (i.e., Living Wage) for the time those employees perform work on the contract or in connection with the grant or financial assistance. The Living Wage must be paid to these employees for the length of the contract/program.

Companies employing fewer than 5 persons and non-profits employing fewer than 10 persons are exempt from compliance with the Living Wage Ordinance. If this exemption applies to your company/non-profit agency please check here ☐ No. of employees _____

The Contractor or Grantee agrees:

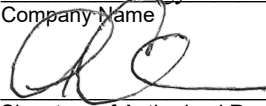
- (a) To pay each of its employees whose wage level is not required to comply with federal, state or local prevailing wage law, for work covered or funded by a contract with or grant from the City, no less than the Living Wage. The current Living Wage is defined as \$15.90/hour for those employers that provide employee health care (as defined in the Ordinance at Section 1:815 Sec. 1 (a)), or no less than \$17.73/hour for those employers that do not provide health care. The Contractor or Grantor understands that the Living Wage is adjusted and established annually on April 30 in accordance with the Ordinance and covered employers shall be required to pay the adjusted amount thereafter to be in compliance with Section 1:815(3).

Check the applicable box below which applies to your workforce

- ☐ Employees who are assigned to any covered City contract/grant will be paid at or above the applicable living wage without health benefits
- ☒ Employees who are assigned to any covered City contract/grant will be paid at or above the applicable living wage with health benefits

- (b) To post a notice approved by the City regarding the applicability of the Living Wage Ordinance in every work place or other location in which employees or other persons contracting for employment are working.
- (c) To provide to the City payroll records or other documentation within ten (10) business days from the receipt of a request by the City.
- (d) To permit access to work sites to City representatives for the purposes of monitoring compliance, and investigating complaints or non-compliance.
- (e) To take no action that would reduce the compensation, wages, fringe benefits, or leave available to any employee covered by the Living Wage Ordinance or any person contracted for employment and covered by the Living Wage Ordinance in order to pay the living wage required by the Living Wage Ordinance.

The undersigned states that he/she has the requisite authority to act on behalf of his/her employer in these matters and has offered to provide the services or agrees to accept financial assistance in accordance with the terms of the Living Wage Ordinance. The undersigned certifies that he/she has read and is familiar with the terms of the Living Wage Ordinance, obligates the Employer/Grantee to those terms and acknowledges that if his/her employer is found to be in violation of Ordinance it may be subject to civil penalties and termination of the awarded contract or grant of financial assistance.

Elevate Energy
 Company Name

 Signature of Authorized Representative
 Date
 Abigail Corso, Chief Strategy Officer
 Print Name and Title

322 S. Green Street
 Street Address
 Chicago, IL 60607
 City, State, Zip
 773-269-4037/abigail.corso@elevatenp.org
 Phone/Email address



ATTACHMENT E

VENDOR CONFLICT OF INTEREST DISCLOSURE FORM


All vendors interested in conducting business with the City of Ann Arbor must complete and return the Vendor Conflict of Interest Disclosure Form in order to be eligible to be awarded a contract. Please note that all vendors are subject to comply with the City of Ann Arbor's conflict of interest policies as stated within the certification section below.

If a vendor has a relationship with a City of Ann Arbor official or employee, an immediate family member of a City of Ann Arbor official or employee, the vendor shall disclose the information required below.

1. No City official or employee or City employee's immediate family member has an ownership interest in vendor's company or is deriving personal financial gain from this contract.
2. No retired or separated City official or employee who has been retired or separated from the City for less than one (1) year has an ownership interest in vendor's Company.
3. No City employee is contemporaneously employed or prospectively to be employed with the vendor.
4. Vendor hereby declares it has not and will not provide gifts or hospitality of any dollar value or any other gratuities to any City employee or elected official to obtain or maintain a contract.
5. Please note any exceptions below:

Conflict of Interest Disclosure*	
Name of City of Ann Arbor employees, elected officials or immediate family members with whom there may be a potential conflict of interest.	<input type="checkbox"/> Relationship to employee <input type="checkbox"/> Interest in vendor's company <input type="checkbox"/> Other (please describe in box below)
None/Not applicable	

*Disclosing a potential conflict of interest does not disqualify vendors. In the event vendors do not disclose potential conflicts of interest and they are detected by the City, vendor will be exempt from doing business with the City.

I certify that this Conflict of Interest Disclosure has been examined by me and that its contents are true and correct to my knowledge and belief and I have the authority to so certify on behalf of the Vendor by my signature below:		
Elevate Energy	773-269-4037	
Vendor Name		Vendor Phone Number
	9/25/2023	Abigail Corso, Chief Strategy Officer
Signature of Vendor Authorized Representative	Date	Printed Name of Vendor Authorized Representative

Questions about this form? Contact Procurement Office City of Ann Arbor Phone: 734/794-6500, procurement@a2gov.org



ELEVATE

Equity through climate action

Henry Love

Email: Henry.Love@ElevateNP.org

Phone: 517.899.5847

Professional Experience

Vice President Strategy

2019 – 2022

Elevate – Ann Arbor, MI

- Lead place-based program development with municipalities, regional governments, and community-based organizations. Build one stop shops and concierge-style programming for building electrification, solar+, contractor development, and high-performance buildings
- Lead technical consulting and assistance projects with municipalities and local governments, including climate planning, community-scale electrification and decarbonization, and integration of programming into centralized hubs
- Manage state-based teams of energy professionals, MBAs, and project managers
- Coordinate across matrix organization with engineering, policy, communications, and research departments

Executive Director

2014 – 2018

American Jobs Project, Berkeley, CA

- Founded organization with current Secretary of Energy and former Michigan Governor, Jennifer Granholm
- Published advanced energy economic development roadmap reports for 22 states, each in partnership with a top state-based university
- Produced measurable impacts, including: \$26.5M in direct public agency investment, 31 stakeholder led non-legislative actions, and 21 legislative actions with 12 policies signed into law as of 2018

Consultant

2008 – 2020

Self-Employed (MI and CA)

- Provide consulting on strategic planning, organizational design, and program development to nonprofit executives, entrepreneurs, and universities
- Developed operations and administration frameworks to ensure legal compliance and provide internal business intelligence, fraud prevention, and efficiency of operations
- Worked with a variety of nonprofits, entrepreneurs, and academic institutions through contracts as well as board and advisory appointments
- Developed successful programs within universities, including the American Jobs Project at the University of California Berkeley's Energy and Climate Institute and the Sustainability Clinic at the University of Michigan School for Environment and Sustainability
- Clients spanned: energy efficiency, renewable energy, carbon management, workforce development, community development, economic development, technology commercialization, public policy and academia

Assistant Director

2011 – 2014

Finance and Operations Manager

2009 – 2011

Michigan Energy Options, East Lansing, MI

- Conducted community energy study of the Mid-Michigan region (Clinton, Ingham, and Eaton counties), including a deep dive into the Michigan Ave. Corridor. Also created an accompanying GIS-based Community Energy Planning Tool.
- Developed and managed over 45 grants and contracts, totaling more than \$15M in funding over 6 years
- Led operations, finances, grant writing, program development and strategic planning

Education

- B.A.A., Entrepreneurship and Finance, Central Michigan University, 2007
- Masters of Business Administration, University of Phoenix, 2010

Elizabeth Wallace

Email: Elizabeth.Wallace@ElevateNP.org

Phone: 810.334.8207

Professional Experience

Associate Director, Michigan Community Programs

2023 – present

Elevate, Detroit, MI

- Manage Michigan Community Programs team to implement programs and projects across the state
- Leads select programs in Detroit and Southeast Michigan
- Coordinates strategic planning for Michigan Community Programs
- Strengthens and develops relationships with local municipal, nonprofit, and private sector partners and clients in the Michigan market

Senior Program Manager, National Strategic Engagement - Michigan

2022 – 2023

Elevate, Detroit, MI

- Lead Detroit and Michigan projects, including the City of Detroit's Climate Strategy, Ann Arbor Home Energy Advisor, Detroit Resilience Hub Network
- Strengthened and developed relationships with local municipal, nonprofit, and private sector partners in Detroit and across Michigan
- Supported strategic planning for Michigan market

Mayoral Fellow, Office of Sustainability

2021 – 2022

City of Detroit, Detroit, MI

- Created [2-year Progress Update for the City's Sustainability Action Agenda](#), providing transparency of sustainability progress and building basis for City's annual sustainability report
- Supported development of the City's Climate Strategy

B-Corporation Certification MBA Consultant

2021

Walker-Miller Energy Services LLC, Detroit, MI

- Designed and built comprehensive B-Corporation certification documentation guide for 300+ question process, preparing company for smooth triple bottom line certification process
- Provided strategic recommendations, aligned with B-Lab Impact Assessment, to increase B-Corporation scoring and guide strategic planning for incoming sustainability lead

Graduate Research Assistant, Water Access and Affordability

2020 – 2021

University of Michigan School for Environment and Sustainability, Ann Arbor, MI

- Collaborated with Dr. Sara Hughes for research on water access and affordability in Detroit, culminating in publishing a [policy brief](#) through University of Michigan's Poverty Solutions initiative

Utility Affordability Program Consultant, Dow Sustainability Fellow

2020 – 2021

EcoWorks, Detroit, MI

- As part of year-long fellowship, built interactive financial viability model and [comprehensive public report](#) for EcoWorks' envisioned utility affordability program for low-income homeowners in Detroit, creating business case to install energy and water efficiency measures with innovative financing methods to prevent utility shutoffs and ensuing foreclosures

MBA/MS Climate + Business Intern

2020

World Wildlife Fund (WWF), Washington, DC

- Developed Science-Based Targets Initiative GHG emissions reduction target-setting model, tool, and [accompanying guidance](#) for companies in the [forest, land, and agriculture sector](#), creating a pathway for ~23% of the world's GHG emissions to align with the Paris Agreement

Consultant, Strategy and Analytics

2017 – 2019

Business Analyst, Strategy and Operations

2015 –2017

Deloitte Consulting LLP, Detroit, MI

- Developed 5-year strategic plan and roadmap for \$135M autonomous vehicle proving ground by leading competitive landscape analysis, customer segmentation, and profitability model development, positioning client for leadership in industry
- Led development of US Department of Transportation autonomous vehicle testing grant proposal on behalf of City of Detroit, coordinating with 30+ regional partners, resulting in selection from 75+ applicants for [\\$7.5M DoT ADAS award](#) and positioning City of Detroit as national leader in mobility
- Coordinated [World Economic Forum Seamless Integrated Mobility System Pilot](#) with Detroit, Ann Arbor, and Windsor, developing 3-year roadmap for regional mobility and sharing lessons learned on a global stage at annual Davos conference
- Led 6 key process improvement initiatives for state government project in distress, as part of turnaround team for 540+ person, \$264M technology platform buildout, bringing practices back on track and increasing client trust for future work
- Owned relationship with 30+ suppliers in capital equipment assessment and disposition initiative for Fortune 10 Automotive OEM, generating \$2M+ revenue and improving control of \$7B+ in specialized tooling assets across global supply base
- Designed, developed, and implemented oversight policies and tracking dashboard for Deloitte's Americas Region, enabling transparency of regional impact and ROI measurement of multi-million-dollar budget for global counterparts

Education

M.B.A., Business Administration, and M.S., Environmental Justice; Environmental Policy and Planning, and University of Michigan, Ann Arbor, 2022

B.B.A., Business Administration, and B.A., Spanish Language and Literature, University of Michigan, Ann Arbor, 2014

Jamie Simmons

Email: Jamie.simmons@ElevateNP.org

Phone: 313-768-6864

Professional Experience

Program Manager, Communities Programs

2023 – present

Elevate, remote

- Lead Ann Arbor and Michigan based projects, including A2ZERO Home Energy Advisor Pilot,
- Strengthens and develops relationships with local municipal, nonprofit, and private sector partners in Detroit and across Michigan
- Supports strategic planning for Michigan market

Community Engagement Report

2022 – 2023

NPR's Michigan Radio

- Planned, developed, and hosted community engagement events in Metro Detroit on the behalf of Michigan Radio.
- Hosted community conversations with Metro Detroit residents and community leaders to identify key target areas for media coverage that aligns with the priorities of the community.
- Combined community engagement with traditional news reporting to do journalism that aims to authentically serve the community and reflect their interests and needs.
- Wrote, researched, and produced radio and web articles that highlight the work of Detroiters, community leaders, and moments of accountability.
- Worked with Michigan Radio's Enterprise team to help the news room transition to a more equitable, justice centered media platform that services cities in Michigan in the way the need to be served.

Community Engagement Director

2021 – 2023

Michigan Climate Action Network

- Developed and implemented a long-term movement building plan that focuses on building authentic partnerships in Michigan that are grounded in social justice and racial equity.
- Led justice centered climate campaigns that expands the climate impact narrative across Michigan in partnership with local grassroots already doing the work.
- Facilitate capacity building and educational opportunities for network members to help further the climate justice movement in Michigan.
- Worked with statewide partners around climate, clean energy, and utility justice to help bring a healthy, equitable future for all Michiganders

Electoral Work Fellowship Assistant

2020 – 2021

Michigan Student Power Network

- Mentored undergraduate organizing fellows on hosting digital house parties for voter and issue advocacy.
- Facilitated Michigan Student Power Network's political education, organizer and recruitment skills, and transformative justice training.
- Advised Electoral Fellows in identifying SMART goals for voter education outreach, relationship building, and continued social justice informed organizing and advocacy work.

Education

B.S. Criminal Justice, Michigan State University, East Lansing, MI, 2019

M.S.W Community and Social Systems, University of Michigan, Ann Arbor, MI, 2020

Alexander Helbach

Email: Alexander.Helbach@ElevateNP.org

Phone: 773.269.2215

Professional Experience

Senior Art Director

2019 – Present

Elevate, Chicago, IL

- Manages creative projects while overseeing the work of a full-time graphic designer as well as freelance video editing team.
- Works closely with Communications and Marketing teams to create visual materials that promote Elevate's brand and program offerings.
- Creates and produces informative motion graphics to promote Elevate's programs.
- Works with director level staff to visually and engagingly explain complicated efficiency concepts.
- Creates inspiring artwork and signage for office walls that promotes Elevate's message.
- Creates marketing materials for ComEd and Ameren Illinois dynamic pricing programs, including bill inserts, direct mail and email materials, online ads, billboards, and magazine advertisements.
- Edits video content to create engaging, educational videos.
- Works with vendors including printers to manage production of materials.
- Selects photography for use in print and digital materials.
- Designs technical reports, white papers, and fact sheets for print and digital distribution.
- Creates inspiring artwork and signage for office walls that promotes Elevate's message.

Art Director

2019 – 2023

Elevate, Chicago, IL

Graphic Designer

2014 – 2019

Elevate, Chicago, IL

Graphics Producer

2011 – 2014

Chicago Tribune, Chicago, IL

- Researched, proposed and produced maps, charts, explainers, and diagrams for the print and online editions of the Chicago Tribune.
- Created high-impact digital or hand-drawn illustrations to run with articles in the print and online editions.
- Developed, researched, and animated motion graphics and animations for website.
- Attended and provided visual input during daily business section planning.
- Coordinated and directed graphics producers to create infographics for Business section.

Graphic Artist

2010-2011

Lansing State Journal, Lansing, MI

- Designed front page layout for daily edition of the Lansing State Journal.
- Created infographics including maps, charts and diagrams to run with stories.
- Designed layout of special section covers for sports and features sections.

Education

- B.S, Visual Communications- Publication Design and Information Graphics,
Ohio University, Athens, OH, 2010

John Kinch, PhD

Executive Director

Kinch directs the strategic and daily operations of Michigan Energy Options (MEO), a clean energy nonprofit emphasizing innovative and collaborative projects between the public and private sectors. Under Kinch, MEO's community-based work has expanded across the state and its revenue stream has diversified. MEO built a community solar park on a capped landfill—one of a few owned and operated by a nonprofit in the country. Kinch is a U.S. Department of Energy SunShot advisor and a National Community Solar Partner, a municipal-certified solar expert by the National Renewable Energy Laboratory, local clean energy consultant for the Council of Michigan Foundations and has been a renewable energy consultant for The Nature Conservancy. He presents often to professional, academic, and general audiences.

Professional Experience

Michigan Energy Options | East Lansing, MI | 2010-present

Executive Director

- Directs statewide nonprofit that seeks to guide communities and leaders to make decisions and take actions to adopt more clean energy and mitigate climate change. Manages offices in Lower and Upper Peninsulas and a staff of 12 with a seven-figure annual budget.
www.Michiganenergyoptions.org

Land Policy Institute | East Lansing, Michigan | 2009-2010

Communications Manager

Avadhi Finance and Technology | Okemos, Michigan | 2007-2009

Marketing Communications and Green Business Development Director

The Nature Conservancy | Washington, D.C. and Michigan | 2005-2007 and 1993-2000

Director of Communications and Senior Writer

University of Michigan, College of LSA | Ann Arbor, Michigan | 2000-2005

Director of Marketing and Communications and Executive Editor

Education, Affiliations, and Awards

- Michigan State University: B.A. in English; Ph.D. in American Studies, May 1996. Dissertation: The Biodiversity Mission in American Environmentalism.
- Serves on the Board of Directors for the Great Lakes Renewable Energy Association and on equity and climate change committees of the West Michigan Sustainable Business Forum; volunteers with Audubon and past volunteer at the Grand Rapids Community Food Club. Former Chair of the City of East Lansing's Commission on the Environment.

Michael J. Larson, MPA

Assistant Director

As the Assistant Director, Michael handles daily operations, program management and oversight for renewable, energy efficiency and planning projects across the state. His experience includes working with local governments, grant management, statewide utility program management to achieve kWh reduction goals, community solar management and organizational development.

Professional Experience

Michigan Energy Options | 2011 - present

Assistant Director/Operations Manager

- Assists in design and implementation of statewide services and programs in areas of renewables and energy efficiency, consulting, community engagement, utility income qualified services, appliance recycling programming, C&I programming, and educational services.
 - Consults on projects for State of Michigan Department of Natural Resources, Department of Corrections, and Department of Technology, Management, and Budget renewable energy planning and siting contracts
 - Designed and assessed Community Energy Management Projects for municipalities upper and lower peninsulas
 - Directed Small Business Association Energy Audit Programs in western Upper Peninsula
- Program management, project reporting detailing progress, materials inventories, and client information.
- Managing personnel, contractors and budgets as related to daily operations and programs.

Northern Michigan University| Marquette, MI | 2008 - 2011

Dean on Duty/Graduate Assistant

- Dean on Duty: primary contact for faculty and students regarding questions and interpretation of university policy.
- Counseling students on appeals processes pertaining to grades and refunds; writing case briefs and making refund recommendations to appeals committee; conducting student withdrawals from university.

Education, Affiliations, and Awards

- Northern Michigan University, Master of Public Administration, 2009
- Marquette City Commissioner, 2023-present
- City of Marquette Planning Commission, 2017-present
- UP Energy Task Force, July 2019-July 2021
- MSU Citizen Planner Certificate, 2017
- Northern Michigan University, Graduate Certificate: Facilitation and Training, 2011
- Northern Michigan University, Bachelor of Science in Public Relations with minor in Economics, 2003

Brandon Kawalec

Sr. Programs Manager

Brandon manages MEO's Utility energy efficiency and renewable energy programs. This work involves large data sets, organization, and detailed reporting. His work includes large program design, implementation, and client relations. Brandon has 10 years of professional experience in project management.

Professional Experience

Michigan Energy Options | East Lansing, MI | 2015 - present

Program Manager

Manage day-to-day operations of the Lansing Board of Water & Light's Residential Energy Waste Reduction portfolio. Responsible for the design, implementation, data tracking, reporting, and invoicing for the residential programs. Oversee strategic planning, program budgeting, forecasting, and subcontractor performance to ensure successful program delivery.

- Responsible for field outreach and education at all participating HVAC contractors and lighting and appliance retailers for BWL high efficiency products program.
- Provides customer service and administration support for the BWL Net Metering and Solar Rebate programs.

Mid-Michigan Environmental Action Council | East Lansing, MI | 2012 - 2015

Director of Programs

Responsible for all programs and projects at organization, including Stream Monitoring, Recycle Rama, and the Mid-Michigan Program for Greater Sustainability's (MMPGS) Community Reinvestment Fund, a grant program designed to engage traditionally underserved and marginalized populations in the local and regional planning process. Managed all social media accounts and assisted with fundraising and grant writing. Served as Interim Executive Director during a leadership transition and worked closely with the board of directors during the hiring process.

- Advocated for environmental, sustainability, and non-motorized transportation issues at the state, regional, and local levels.
- Responsible for managing all aspects of regional water quality monitoring program, including volunteer outreach and coordination and data validation.

Education, Affiliations, and Awards

- Bachelor of Science in Environmental Studies & Agriscience, Michigan State University, 2012
 - Concentration in Science and Policy
 - Specialization in Environmental Economics

Angela Marez

Residential Program Manager | she/her

Angela currently serves as a Residential Program Manager for Michigan Energy Options energy waste reduction programs. Prior to this role, she served as a multi-family Property Manager with experience in LITHC tax-credit, MSHDA and Rural Development programs. She has a track record of optimizing program performance and prioritizing multiple complex projects simultaneously.

Professional Experience

Michigan Energy Options | East Lansing, Michigan | 2021-Present

Residential Program Manager

Manages the implementation of energy efficiency programs, which includes program planning, scheduling, logistics, inventory tracking, data reporting, and client communication.

- Plans and executes low-income and multifamily outreach programs
- Manages energy assessment and appliance recycling databases
- Prepares monthly reporting for clients

Red Oak Management | Cedar Springs, Michigan | 2017-2021

Property Manager

Management of four affordable housing communities in Eaton and Barry Counties in accordance with MSHDA, LITHC and Rural Development guidelines. Coordinated with Regional Manager and corporate office staff on budgets, occupancy, and marketing.

- Maintained waitlists and processed rental applications, renewals, and certifications
- Inspected and planned improvements of buildings and housing units
- Connected and engaged with residents and vendors

DTN Management | Lansing, Michigan | 2006-2010

Administrative Assistant

Administrative support to Marketing Director and Office Manager. Coordinated with site staff on marketing direction and tracked and reported marketing strategies and results.

- Maintained calendar and appointments for Marketing Director
- Planned and executed employee training conferences
- Served as Master Controller for student housing change-over

Education, Affiliations, and Awards

- Fair Housing Certification, Red Oak Management, 2020, 2019, 2018, 2017
- Housing Compliance Specialist Certification, E & A Team, 2019
- Green Star Award, Meridian Commercial Recycling Group, 2010

Lauren Chapman

Program Coordinator | she/they

Lauren serves as Program and rebate Coordinator for both the BWL Hometown Energy Savers and the U.P. Energy Innovations Collaborative (U.P. EIC) programs. In addition, Lauren coordinates residential energy efficiency programs and has developed and implemented the High Efficiency Products rebate program for eight utilities across Michigan. Lauren manages rebate administration across the MEO portfolio and has ample experience in direct install projects, community outreach events, and day-to-day customer service. Lauren's passion for energy sustainability and access for all continues to inspire their work and dedication to all customers.

Professional Experience

Michigan Energy Options | East Lansing, MI | 2019 – present

Program Coordinator – Lansing Board of Water and Light

Coordinates the Lansing Board of Water & Light's residential energy waste reduction programs; these programs consist of Appliance Recycling, Income Eligible, and High Efficiency Products. These program roles include planning and scheduling, utility customer assistance, data collection, community outreach, and compiling and finalizing the monthly program reports and narrative. Responsible for rebate application collection, processing, batching, and reporting.

Program Coordinator – U.P. Energy Innovations Collaborative

Developed and currently coordinates the residential and commercial High Efficiency Products and Electrification rebate programs for the following utilities: Baraga Electric Utility, The City of Crystal Falls Electric Department, The City of Gladstone, L'Anse Village by the Bay, Negaunee Electric Department, The City of Norway, and Ontonagon County REA. Program roles consist of initial database development, application collection, processing, batching, check logging, as well as creating monthly reports.

Key accomplishments at Michigan Energy Options:

- Promoted from Intern to Project Specialist in 2021, and to Program Coordinator in 2023.
- Implemented the High Efficiency Products (HEP) Residential Rebate program for BWL.
- Developed and Implemented the Residential and Commercial HEP and Electrification Rebate programs for the seven U.P EIC Utilities.
- Enhanced BWL's Residential Rebate program timetable to ensure customers are receiving rebates or notifications within two weeks or less.
- Responsible for monthly reporting, data entry, and weekly rebate check batches.

Education, Affiliations, and Awards

- Building Michigan Communities Conference, 2023
- Bachelor of Arts in Women's and Gender Studies, Michigan State University, In Progress
- Bachelor of Arts in Religious Studies, Michigan State University, In Progress
 - Concentration in Nonprofit Leadership
- Robert T. Anderson Award, 2020