



CITY OF ANN ARBOR HOME ENERGY ADVISOR PROGRAM

RFP # 23-49

TO	FROM
City of Ann Arbor Office of Sustainability and Innovation 301 E. Huron Street Ann Arbor, MI 48104	Carla Walker-Miller Chief Executive Officer Walker-Miller Energy Services 8045 2 nd Ave. Detroit, MI 40202 walkermiller@wmenergy.com 313-366-8535



October 3, 2023

City of Ann Arbor
Procurement Unit
301 E. Huron Street
Ann Arbor, MI 48104

Dear Ms. Roth and the City of Ann Arbor Evaluation Team,

Thank you for the opportunity to submit this proposal for the Ann Arbor Home Energy Advisor Program. Walker-Miller Energy Services has the will, knowledge, and resources to address the City's need to demystify the process of building decarbonization for its residents, and to help support the greater A2Zero goals that the city has set.

A Certified B Corp, founded in 2000, Walker-Miller has cultivated success based on our unwavering core values. We **Boldly Go** above and beyond, delivering **Extraordinary Experiences** for your customers, our team members, clients, and stakeholders while demonstrating **Inclusive Stewardship, Humble Confidence, Equity**, and abiding appreciation of the **Value** of our individual and collective **Reputation**.

Anchored by a 23-year doing-well-by-doing-good business philosophy, and nearly 40-year energy industry legacy, our team combines a rare blend of talent, experience, and technology, seasoned with empathy and a serving spirit. Guided by our mission statement of **Empowering People, Enriching Communities**, we consistently translate our core values into action, ensuring exceptional experiences for our customers.

At Walker-Miller, we aspire to be the best-operated company in energy efficiency implementation, so "good" is never good enough. Our commitment is to deliver our best and highest efforts to all customers, which directly translates into delivering the highest quality service to the City of Ann Arbor and its residents. We are steadfast in our belief that by providing an extraordinary experience to residents we can make a significant difference in the way that they understand and manage energy, and help them to foster healthier, more affordable, and more climate-friendly homes.

One of our core strengths lies in effectively reaching and delivering programs to all communities, which aligns closely with our mission. As we envision the future of building decarbonization, we see a virtuous cycle of high-performing programs powered by an exceptionally skilled and diverse talent base that brings numerous benefits to their own communities. We have already witnessed this vision become a reality through the successful implementation of programs in Illinois, Michigan, Missouri, Georgia, and Pennsylvania. We are truly excited about the opportunity to partner with Ann Arbor to further empower people and enrich communities.

The City of Ann Arbor's plans to equitably incorporate clean energy has the potential to change the overall quality of life of those fortunate enough to reap the benefits of the associated technologies. However, it is paramount that decarbonization planning considers how benefits are also accessible to and shared with communities that have historically carried the environmental burdens of our society's progress. These communities, environmental justice communities, deserve to have their concerns interwoven into the planning of clean energy planning and infrastructure. The economic benefits of equitably distributing the benefits of clean energy generation to marginalized communities is currently unknown, but we have the opportunity to change that by integrating the needs of these communities through direct engagement and incorporating energy and environmental justice principles.

Now that equity and justice have taken their rightful place in business discourse, we must reach a point where institutions are willing to fund the hard work of defining and achieving each. The earnest and robust initiatives required to drive equity must be designed, budgeted for, and adequately financed in the early stages of any endeavor. Too often, equity is shoehorned into a mature initiative in the backend. As a result, it does not receive the rigorous consideration it deserves.

Our proposed budget is based on our best approximation of the effort required, given the information at hand; We welcome further clarifying discussions. This budget reflects our experience performing similar work for other institutions and utilities, and incorporates the considerable effort and resources we feel will be required to accomplish the City of Ann Arbor's goals for this work. Additionally, given the likelihood that additional necessary tasks will be identified, we would like to reserve a 5% contingency so that budget adjustments may be made as needed without requiring change orders.

Thank you again for considering our proposal. We look forward to the opportunity to contribute our expertise and passion to the success of the Home Energy Advisor program. Together, we can achieve remarkable results and create a lasting impact.

Sincerely,



Carla Walker-Miller
CEO, Walker-Miller Energy Services

Authorized Negotiator



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A. Professional Qualifications

Corporate Information

State the full name and address of your organization and, if applicable, the branch office or other subsidiary element that will perform, or assist in performing, the work hereunder. Indicate whether it operates as an individual, partnership, or corporation. If as a corporation, include whether it is licensed to operate in the State of Michigan.

Walker-Miller Energy Services is a single member LLC, certified as African American Owned by the Chicago Minority Supplier Development Council, and certified as Woman Owned by the Women's Business Enterprise National. We are licensed to operate in the State of Michigan, and will perform out of our headquarters at:

8045 2nd Ave
Detroit, MI 48202

The City of Ann Arbor can trust Walker-Miller to drive the Home Energy Advisor Program to success. Through collaboration, we will work together to scale our collective impact, resulting in best-in-class customer service, innovative program design, and creative approaches to program delivery. Our history of conducting Home Energy Assessments across Michigan, including in Ann Arbor, sets us up for success in the execution of this program. We will maximize our strengths in this partnership using the following attributes:

- Experience and ability to quickly deploy a Home Energy Advisor team
- Workforce already in place in the State of Michigan; Southeast Michigan in particular
- Cutting edge marketing and IT solutions
- Established relationships with the Michigan contractor network
- Innovative and nimble management stance with program design that is simple yet adaptable
- Capability to leverage local utility rebate programs, including low-income programs
- A streamlined eligibility and verification process
- Direct engagement and partnership with the implementor of the Ann Arbor Residential Rebate Program
- Capability to meet targeted goals and readiness level to scale the program as needed.
- Knowledgeable assessment team of BPI certified professionals, empowered with the ability to adapt to address customer needs
- Established workforce development programs (e.g. *Energy Efficiency Academy*) to build a local workforce of skilled workers for years to come

Staffing Plan

Include the name of executive and professional personnel by skill and qualification that will be employed in the work. Show where these personnel will be physically located during the time they are engaged in the work. Indicate which of these individuals you consider key to the successful completion of the project. Identify only individuals who will do the work on this project by name and title. Resumes and qualifications are required for all proposed project personnel, including all subcontractors.

Involved in the implementation of the Home Energy Advisor program will be the following experts. Resumes for roles which are key to successful completion of the program are attached to this document.

Name + Title	Location	Certifications	Experience
Ben Dueweke Director of Community Partnerships	Detroit, Michigan	Six Sigma Yellow Belt	Program Start-Up, Program Management
Cameron Seeley Portfolio Manager	Detroit, Michigan	Six Sigma Green Belt	Program Start-Up, Program Management, Change Management
Darius Fells Program Manager*	Detroit, Michigan	BPI Home Energy Professional Energy Auditor DOE Certified Home Energy Score Assessor	DTE Home Energy Consultation Program, Weatherization Assistance Program, DOE Home Energy Scores
Curtis Christian Energy Advisor*	Detroit, Michigan	BPI Building Analyst BPI Healthy Home Evaluator	DTE Home Energy Consultation Program
Robert Morton Project Coordinator*	Detroit, Michigan	BPI Building Analyst BPI Multifamily Building Analyst	DTE Home Energy Consultation Program, DTE Multifamily Program
Sean Greenroyd IT Support*	Detroit, MI		Power Apps, Power Automate, VBA & Python Development

*Indicates role that is key to successful completion of project

The execution of the HEA Program will be accomplished primarily through three full-time positions: a Program Manager (PM), Energy Advisor (EA), and Project Coordinator (PC), and supported by a part-time IT Support role. These roles will work together to accomplish all the primary elements of the HEA Program. More information on the interaction between these roles can be found in Section C of this proposal.

Program Manager: The Program Manager (PM) role requires both a foundational and practical knowledge of building science (minimum: BPI Building Analyst + DOE Home Energy Score Assessor) as well as strong people/project management, and communication skills. The PM will be responsible for the direct management of the other two primary program roles, performing any in-person assessments, communicating with customers, and working with the City as the primary point of contact for communications around program administration.



Energy Advisor: The Energy Advisor (EA) role will require a foundational and practical knowledge of building science (minimum: BPI Building Analyst) and strong project management and communication skills. The EA will be responsible for performing virtual assessments for the program, communicating with

customers about the results of their assessments, as well as supporting additional inquiries and follow-up inquiries from the program customer base.

Project Coordinator: The Project Coordinator (PC) role will require a base level knowledge in building science (minimum: BPI Building Science Principles), as well as strong organizational and communication skills. The PC will be responsible for the initial interface with the customer including program onboarding and data collection. The PC will also be responsible for coordinating with the PM and EA to schedule virtual and in-person assessments. The PC will also support the PM with back-end data management and reporting.

History of the Firm

State history of the firm, in terms of length of existence, types of services provided, etc. Identify the technical details that make the firm uniquely qualified for this work, including the firm's ability to scale up or down resources in a

Walker-Miller has been successfully delivering energy efficiency programs in Michigan and the Midwest for more than a decade. Over this time, we are proud to have curated a diverse, talented team of Engineers, Certified Energy Managers, BPI Certified Professionals, Six Sigma practitioners, and other professionals to deliver exceptional energy efficiency services. Our core values and current operations are augmented by our standing as a certified BPI Goldstar Contractor, allowing us to not only train with industry best practices in mind but also staff programs with individuals who hold safety and customer satisfaction paramount.

We began work with DTE at the start of the EWR programs resulting from Public Act 295 of 2008 and have supported utility clients in the Great Lake States including Consumers Energy, ComEd, and Ameren Illinois. As part of our program expertise, we provide end-to-end energy consulting services from planning, research/potential studies, advisory, to implementation with support from our award-winning marketing team. As leaders in the energy efficiency industry, our team has dedicated the past two decades to supporting energy efficiency initiatives and providing guidance and leadership to utilities, as well as state and local governments.

Notable accolades come from the American Council for an Energy-Efficient Economy (ACEEE), the Association of Energy Services Professionals, the Michigan Energy Efficiency Contractors Association (MEECA), the Midwest Energy Efficiency Alliance (MEEA), EPA, and the DOE. Our efforts in Michigan resulted in receiving the **2023 Implementation Contractor of the Year Award from MEECA.**

Walker-Miller has been implementing the DTE's Home Energy Consultation (HEC) and Multifamily (MF) programs since 2015. As the implementor during the 2020 program year, Walker-Miller faced numerous challenges posed by the pandemic and the resulting restrictions. Our team successfully achieved program goals and metrics within a condensed nine-month timeframe by demonstrating flexibility and adapting to evolving conditions. Throughout the implementation process, we continuously evaluated our measure mix, adjusting it to accommodate supply chain limitations and ensure effective project execution.

Utilizing available virtual tools, we established seamless communication channels with homeowners, property managers and tenants, whenever feasible. This enabled us to efficiently carry out our projects, implement quality control measures, and ensure prompt payment release. Our efforts were recognized and validated by DTE's evaluator, Guidehouse, which

MEECA Implementation Contractor of the Year 2023



reported a 96% Customer Satisfaction Rate, an increase from the previous year, among both property managers and tenants, and a 100% commercial IRAF. While in-person assessments are more frequent, virtual assessments are still currently offered.

Customer Service and Continuous Process Improvement

Provide details about the firm's approach to customer service and continuous process improvement.

As a Six Sigma rooted organization, Walker-Miller continually looks for opportunities to refine and innovate. Our quality assurance process incorporates Six Sigma principles, with well-defined core processes that drive excellence in every element of the program. We have established consistent technical and customer service training regimens for team members, centered by a commitment to honor the customers we serve, and rigorous inspection metrics. When problems are identified, we apply the 8-D quality management tool to all areas of the company. 8-D is a vehicle for a cross-functional team to articulate thoughts and provide scientific determination to both detail problems and identify solutions. The 8-D quality management tool allows us to get to the root of a problem and verify the solution works. We then socialize the solution throughout all relevant areas of the company and prevent both the recurrence of the specific problem as well as proactively layer in quality standards throughout the organization.

Walker-Miller utilizes a proven continuous improvement method that harnesses daily, and weekly lessons learned to deliver an enhanced and improved customer experience for our clients, team members, and customers alike. We follow a "Cycle of Continuous Improvement," rooted in clear baseline policies from our Operations Manual. These policies are communicated and regularly reinforced to trade allies, program staff, and other stakeholders.

The team found After Action Review (AAR) tools to be valuable in surfacing issues that lead to why's and root causes. The team conducts AAR sessions with program teams and key stakeholders to reveal information and data for development of problem statements, gaps, and counter measures to resolve a myriad of diverse challenges.

Continuous improvement is critical to customer satisfaction, maintaining a safe work environment, and meeting contracted program obligations successfully. On a regular basis, group meetings and other team or management interactions will obtain feedback and look for opportunities to improve and streamline processes and deliver more energy savings. Two examples of continuous improvement we have implemented in other programs to enhance customer service in similar programs are the following:

Enhanced Service Desk Capabilities: The service desk for the DTE HEC and MF programs have undergone enhancements to become the primary point of contact for all customer escalations. Previously, customers would experience multiple handoffs between Tier 1, the Tier 2 call center, and program support. This meant that customers had to interact with multiple individuals, often 3, 4, or even 5 people, to receive updates on their escalations. Now, we have established the Service Desk as the primary point of contact for all customer escalations. When a customer



Figure 1. Cycle of Continuous Improvement



reaches Tier 2, the customer's information is directly forwarded to the Service Desk, and the Service Desk contacts the customer within the same business day. This allows all communications regarding the escalation to take place between the customer and one dedicated individual. By centralizing the handling of escalations, the Service Desk has access to all historical details and background information, eliminating the need to repeat or re-capture information from the customer. Furthermore, customers no longer need to call in to inquire about the status of their escalation. Instead, all updates regarding the escalation are proactively provided to the customer by the Service Desk. This streamlined approach ensures that all customer concerns are addressed promptly and efficiently from a single contact point. The Service Desk manages a comprehensive case log to track and document each customer interaction related to their escalation. Additionally, it can dispatch an energy specialist for a service call, if necessary, based on the escalation's requirements. This expansion of capabilities enhances the overall customer experience by providing centralized and effective support.

Property Manager Checklist: In our DTE MF program, we implemented a property manager checklist that provides clear instructions to property staff on how to prepare for an energy advisor appointment to improve customer satisfaction and Evaluation, Measurement, and Verification (EM&V) results. Previously, customers were often unprepared for assessments, leading to inefficiencies and issues during the process.



The property manager checklist addresses several key areas to ensure smooth operations:

- **Tenant Communication:** The checklist confirms that property staff are aware and responsible for providing a two-day notice to tenants regarding the upcoming assessments. This helps tenants prepare and avoids any last-minute surprises. Additionally, the checklist informs customers that tenants should contact the property staff directly for any issues instead of reaching out to the CEC (Customer Engagement Center).
- **Availability of Property Staff:** One common issue was the unavailability of property staff or door openers on the day of the installation. The checklist emphasizes the importance of having property staff present during the installation or requesting additional staff, such as security personnel, from the program team. This ensures a smooth process and minimizes delays.
- **Setting Expectations:** To avoid confusion and ensure clarity on the measures to be installed, the checklist emphasizes the importance of level setting expectations between the Energy Advisor (EA), Installation Staff, and the customer. This ensures that everyone is on the same page regarding the planned measures, their implementation, and any specific requirements.

B. Past Involvement with Similar Projects

The written proposal must include a list of specific experiences in the project area and indicate proven ability in implementing similar projects for the firm and the individuals to be involved in the project. A complete list of client references must be provided for similar projects recently completed. The list shall include the firm/agency name, address, telephone number, project title, and contact person. Firms should be specific with how their previous work mirrors (or not) the scope outlined in Section II.

Walker-Miller has a strong history of success delivering residential energy efficiency programs for our customers. Ann Arbor's proposed Home Energy Advisor program shares many elements with programs that Walker-Miller has been implementing for years in Michigan and Illinois. The DTE Home Energy Consultation (HEC) Program, DTE Multifamily (MF) Program, and Ameren Home Energy Income Qualified (HEIQ) program are excellent examples of how our team delivers high volume programs while ensuring our customers all receive an extraordinary experience. Summaries of these programs below speak to several capabilities that will be critical to the successful execution of the Home Energy Advisor Program including, but not limited to:

- Designing and managing single and multifamily residential energy efficiency programs at various scales
- A strong ability to interface with households to deliver energy efficiency products as well as advice and guidance on energy efficiency improvement strategies
- Outreach and marketing strategies capabilities to drive customer acquisition
- The ability to work across customer all segments and to connect with historically disengaged and disadvantaged communities
- A consistent commitment to ensure customers receive an extraordinary experience across the lifetime of programs

DTE Home Energy Consultation (HEC) Program

Since 2015, The Walker-Miller Team has implemented the DTE Home Energy Consultation Program. This program is offered to customers who live in single family homes, duplexes, or condominiums. Walker-Miller performs outreach efforts, including executing a marketing campaign, attending outreach events, and implementing door-to-door outreach to schedule an Energy Advisor to complete a basic home walk-through. At the end of the assessment, the customer is provided with a personalized home energy profile, aimed at helping them optimize their energy consumption, reduce energy waste, and ultimately achieve energy savings. Our unprecedented record of 100% Customer Satisfaction scores in the DTE HEC program is a testament to the high expectations and precise training of our field team. Below are a few recent statistics:

- ✓ **100%** Monthly Customer Satisfaction rating **eleven times** between 2021-2023 (as verified by 3rd Party)
- ✓ **20,000** appointments in 2022
- ✓ **18,000** appointments to date in 2023
- ✓ **11,100** MWh in savings in 2022
- ✓ **655,300** Therms in savings in 2022
- ✓ Implemented Window Film Insulation Kits
- ✓ Installed Energy Bridges for income-qualified homes

DTE Multifamily (MF) Program

The DTE Energy Multifamily Program is an energy efficiency initiative designed to help multifamily buildings reduce energy usage and costs. By installing free energy-saving upgrades, tenants and owners can save money on utility bills, increase comfort levels and contribute to a more environmentally friendly living space. Owners can also receive incentives when

they upgrade to qualifying, energy-efficient equipment, such as HVAC, lighting, and water heating at their property. Below are a few recent, relevant statistics:

- ✓ **100%** Customer Satisfaction four times in 2022 as verified by a 3rd Party
- ✓ **238 prescriptive applications** in 2022
- ✓ **49 Market Rate prescriptive applications** in 2022
- ✓ Served over **1,500 direct install units** in 2022
- ✓ **10,700 MWh** in savings in 2023
- ✓ **1,083,600 Therms** in savings in 2023
- ✓ In 2023, the program shifted towards comprehensive, prescriptive work serving DTE's Income-Qualified populations.
- ✓ Enhanced focus on IQ weatherization
- ✓ Premium DI lighting offered to drive contractor lighting participation

DTE Contact Information:

1 Energy Plaza
 Detroit, MI 48226
 313-235-4000

John Boladian
 Director of Energy Waste Reduction Services
 313-235-0296
John.boladian@dteenergy.com

Ameren Illinois Single Family Home Energy Income Qualified (HEIQ) Initiative

Walker-Miller has implemented the Ameren Illinois HEIQ Initiative since 2018. The initiative is offered to Ameren Illinois low- to moderate-income customers residing in single-family homes. Walker-Miller provides marketing and outreach through educational collateral, presentations, informational booths, and events to increase awareness and recruit customers into the program. Once an applicant is approved, that customer is assigned a Walker-Miller field staff member who acts as their Personal Energy Advisor (PEA) to answer questions and help guide each customer through their journey. The PEA also provides a BPI-certified home energy assessment on the customer's home. These assessments include the installation of eligible direct install measures, identification of health and safety improvements or remediations needed, and information for Program Allies to develop a clear work scope that outlines building envelope and possible HVAC upgrades. Once a project is completed, Walker-Miller staff conduct QA/QC visits to ensure quality of work. Below are a few recent statistics:

- ✓ **791 assessments** completed in 2022
- ✓ **1,800 assessments** to date in 2023
- ✓ **2,051 SAVE Kits** with Direct Install Measures sent to customers in 2022 (due to COVID restraints)
- ✓ **11,674,722 kWh** savings in 2022
- ✓ **188,309 therm** savings in 2022
- ✓ **\$9.4M** total incentive budget in 2022
- ✓ **All 2022 savings and spend goals met**
- ✓ **6,823,508 kWh** savings to date in 2023
- ✓ **157,691 therm** savings to date in 2023
- ✓ **\$13.5M** total incentive budget in 2023
- ✓ **All 2023 savings and spend goals projected to be met** by Nov. 30, 2023

Ameren Illinois Contact Information:

PO Box 5098
 Peoria, IL 61601-9998
 309.677.5575d

Lance Escue
 Leidos, Inc: Implementation Portfolio Director
lescue@ameren.com

C. Proposed Work Plan

Provide a detailed and comprehensive description of how the offeror intends to provide the services requested in this RFP. This description shall include, but not be limited to (the following bullet points in red bold)

- **The company's general philosophy regarding providing the requested services:**

Walker-Miller's consistent delivery of program goals, alongside high customer satisfaction, is empowered by our company culture. As a proud Certified B Corporation, our successes are built upon the deeply rooted core values, we **Boldly Go** above and beyond, **Embracing Equity** in everything we do while delivering **Extraordinary Experiences** for our team members, clients, and stakeholders by demonstrating **Inclusive Stewardship**, **Humble Confidence**, and abiding appreciation of the **Value** of our individual and collective **Reputations**.

Anchored by a 23-year doing-well-by-doing-good business philosophy, and nearly 40-year energy industry legacy, our team combines a rare blend of talent, experience, and technology, seasoned with empathy and a serving spirit. As we bring our core values into action every day, we live our mission statement of "**Empowering People, Enriching Communities**" and articulate our core values in every action. Woven throughout Walker-Miller is a dedication to building a more equitable and inclusive energy industry that both serves underrepresented utility customers and is driven by the powerful contributions of underrepresented, diverse suppliers and team members.

Walker-Miller is proud to have curated a diverse, talented team of Engineers, Certified Energy Managers (CEM), BPI Certified Professionals, Six Sigma practitioners, and other professionals to deliver exceptional energy efficiency services. Our core values and current operations are augmented by our standing as a certified BPI Goldstar Contractor, allowing us to not only train with industry best practices in mind but also staff programs with individuals who hold safety and customer satisfaction paramount.

From our Detroit Headquarters to offices in Illinois, Ohio, Pennsylvania, and Georgia, Walker-Miller's unique, people-focused approach to energy efficiency program delivery is primed for sustained success and we are excited for the future partnerships and opportunities to come.

Project Management and Scheduling

- **How the projects will be managed and scheduled**
- **Proposed communication and coordination tools and frequency of deployment**
- **Details on the working relationship between the offeror and City staff**
- **How workloads will be scaled up or down depending on demand**
- **Any other relevant proposed details to how the work will be carried out, reviewed, assessed, and revised**

Program Startup

Walker-Miller has extensive experience in program start up and if awarded this program, our Start-Up team will immediately begin working in the following areas to develop the fine details of this program in collaboration with the City of Ann Arbor.

- **Defining the Home Energy Advisor Program Start-Up Team** - Immediately upon notification of an imminent award, Walker-Miller's first responsibility will be to assemble the start-up team. The start-up team will include experts from project management, finance, outreach, marketing, operations, and IT.
- **Kick-Off Meeting** – Within the first two weeks after notification of award, the start-up team will host a stakeholder kick-off meeting which will include team members from City staff representatives from relevant programs and offices, Walker-Miller's Senior Leadership, and Walker-Miller's Start-Up Team. The kick-off meeting will review a summary report of the HEA Program pilot, gather information relevant to the design of the HEA Program, the

proposed critical path timeline for launch, and processes for getting necessary program collateral developed and approved.

- **Discovery Sessions** – Within the first month after notification award, the Start-Up Team will host a series of discovery sessions with the program stakeholders to develop a program design with feedback from the City of Ann Arbor. Discovery sessions allow the client to vet and provide feedback on the proposed program design. The discovery sessions will begin with Walker-Miller providing a high-level summary of the proposed program design based on research and past program experience. The meetings will develop into a conversation exploring the client’s needs, proposed solutions, and feedback on the proposed program designs. The outcomes of the discovery sessions will ensure a successful and well-informed program design as well as impact the Strategic Implementation Plan and other deliverables influenced by the program design. The topics covered includes, but is not limited to:
 - Reviewing materials from the HEA Program pilot, including a summary of the experience, findings, and lessons learning, the Path to Zero Decarbonization Template, the Energy Assessment Report, and the Operations Guide.
 - Reviewing materials, experience, findings, and lessons learned from other communities that have operated similar programs, including Holland, MI, and the *I Heart My Home Program* in Connecticut.
 - Develop a go-to-market strategy to outline efforts through the end of the program contract, or any other program elements that need feedback from the client.
- **Reoccurring Meetings** – During Program Planning, Walker-Miller will meet with City staff representatives weekly to share status updates and collaboratively make program decisions.
- **Start-Up Management** – The Walker-Miller Start-Up team will provide weekly updates, a start-up transition timeline, and a matrix outlining roles and responsibilities. We will establish a cloud-based management environment to house all documents, and to help us understand, track, and provide real time reporting on the status of the launch. We will utilize all relevant information provided by the discovery sessions to understand the necessary program elements needed, best practices and identify any gaps that may exist.
- **Strategic Implementation Plan** – Upon immediate award of the Home Energy Advisor opportunity, a formal Strategic Implementation Plan will be developed as a result of coordination between the City representatives, The Walker-Miller Start-up Team, and any additional stakeholders. The Strategic Implementation Plan will provide detailed documentation of how Walker-Miller plans to execute the program and achieve KPIs. The Strategic Implementation Plan will be approved by The City of Ann Arbor. All team members assisting with the program should be familiar with the procedures and processes outlined in the operations manual.
- **Marketing and Outreach Plan** – As discussed in [Marketing and Outreach](#), a plan will be developed as a stand-alone document and included in appendix of the Strategic Implementation Plan.
- **Purchasing and Operations** – We will purchase the tools, equipment, and inventory needed to implement the program and have these resources available to the program.
- **IT Systems and Database Integration** – During the start-up phase, our team will benefit from the current existing structure in place, and identify any additional tools required for successful execution of the Program.
- **Financial Coordination** –Walker-Miller will work with the City to establish timely and accurate accounting and invoicing processes for the program. We will define and test the invoicing supporting documentation necessary to ensure appropriate timing and reliable, accurate content of all invoices.

As one of the deliverables to the initial Program Planning phase, Walker-Miller will review the Operations Guide derived from the HEA Program Pilot, combined with information collected from the Discovery Sessions to create an Operations Plan. Walker-Miller’s approach to creating the Operations Plan includes, but is not limited to:

- Program deliverables
 - Deliverables
 - Key dates
 - Expected deliverable outcomes
 - Process steps

- Flow charts
 - Customer Journey
 - Customer Awareness
 - Application Process
 - Virtual + In-Person Assessments
 - Follow Up Inquiries
- Limit liability and increase scalability
 - Strategies for removing barriers to participation
 - Leveraging internal team members and external stakeholders to assist in surge capacity
 - Risk mitigation strategy
 - Safety plan
- Cost reduction
 - Marketing and outreach strategies
 - Contracting management strategies
 - Working with the Residential Rebate Program to identify synergy opportunities
- Standardized procedures and perform services efficiently
 - Quick and effective on-boarding and training
 - Visualized reporting (i.e., Power BI)
 - Documentation of best practices
- Quality Assurance / Quality Control
 - Invoicing and Accruals Process
 - Data integrity and transfers
 - Primary and backup positions for monthly progress and financial reporting
 - Escalation matrix

Proposed Program Delivery Framework

Walker-Miller is proposing to design the Home Energy Advisor program in a manner that draws from the HEA Pilot Program as well as our own experience in program design. As introduced in Section A of this proposal, the execution of the HEA Program will be accomplished primarily through three positions: a Program Manager (PM), Energy Advisor (EA), and Project Coordinator (PC). These three roles will work together to accomplish all the primary elements of the HEA Program.

The PC will be responsible for initial customer intake and fielding requests for assessments or other inquiries coming through the program website or phone service. Once a customer is segmented into the correct channel, the PC will also be responsible for the initial communications and data collection for that customer. Once the base data has been collected and a project file has been created for the customer, the PC will schedule the customer for either a virtual assessment, in-person assessment, or follow-up consultation with either the Program Manager or the Energy Advisor and hand off the project file to that team member. This customer hand off and appointment scheduling will be performed using Microsoft Outlook Calendar and Email functionality. The email from the PC to the PM or EA will include the link to the project file that has been started by the PC.

The PM or the EA will be responsible for performing the assessment, developing an Assessment Report + Path to Zero, and then presenting and reviewing their findings to the customer. If at any point during or after the assessment process the customer has questions or would like additional information regarding their home, rebates, other resources, etc. they will be able to ping the HEA team either through email or phone and set up time with either the PM or EA to address their inquiries. Our plan is to provide a seamless customer experience, where each handoff builds on the information gathered from the last touchpoint. A flow chart with our proposed workflow can be found below in Figure 2.

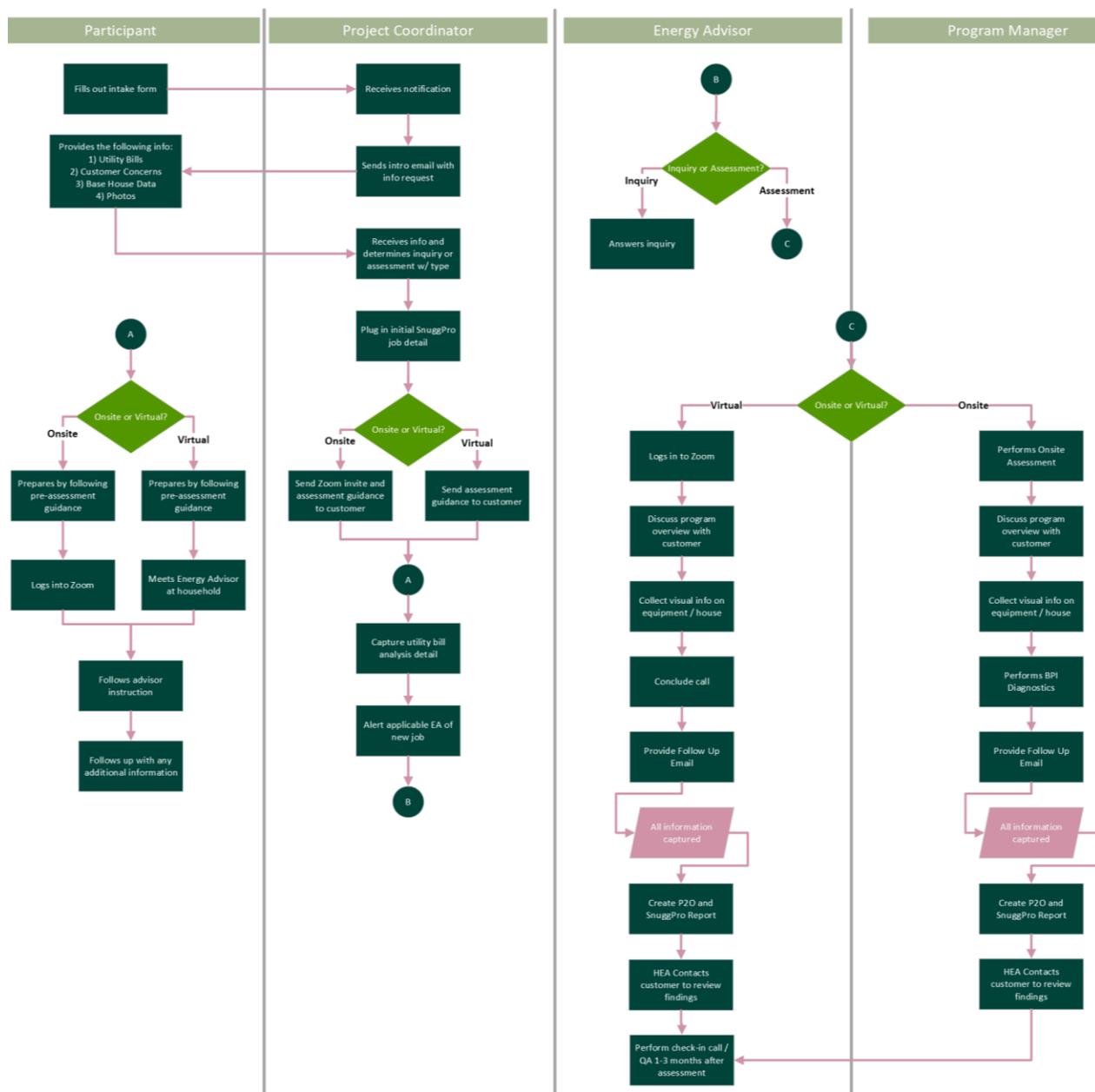


Figure 2: Proposed Process Flow for Customer Intake and Engagement

Virtual Assessments: After initial program intake and segmentation, customers receiving virtual assessment services will first submit basic data about their home to the Project Coordinator through email and/or a web interface. The PC will use this data as the basis of a project file, and then work to schedule time with the customer for their virtual assessment. In an effort to be as inclusive as possible, the HEA team is proposing to work with customers to use a video conferencing platform they are comfortable with (e.g. Facetime, Google Meet, Zoom, etc.) and have materials developed to support the use of these platforms by customers. Before the day of the assessment, the PC will perform a ‘tech-check’ with customers to make sure they are comfortable using technology, and to ensure the Energy Advisor has a seamless experience. The assessment will include a 45-90 minute appointment where the customer will answer questions and walk through their

home in order for the EA to collect additional data required to complete their Snugg Pro report and Path to Zero. Once these reports have been completed, the HEA team will schedule a follow-up call with the customer to review findings and answer any additional questions. *Note: The Department of Energy does not allow for virtual Home Energy Scores to be completed at this time.*

In-Person Assessments: Customers receiving In-Person assessments will be met on site at their house by the Program Manager and receive a home assessment that mirrors the Virtual Assessment, but will also include a DOE Home Energy Score as well as additional diagnostic tests including a blower door air leakage test, Combustion Appliance Zone (CAZ) testing, carbon monoxide monitoring, etc. This data will be compiled in the same report format that the Virtual Assessment data is presented in (including a customized Path to Zero), but which will also include a Home Energy Score report. Once these reports have been completed, the HEA team will schedule a follow-up call with the customer to review findings and answer any additional questions.

Multifamily Assessments: For qualified multifamily participants, our team will complete a comprehensive on-site ASHRAE Level 1 assessment with the following goals:

- Identify the largest and most cost-effective opportunities for energy reduction.
- Evaluate 12 months of energy usage to identify periods of high energy consumption.
- Compile a list of energy savings recommendations and cost analysis including project payback periods.
- Estimate incentives available through the DTE MF program (and other eligible programs) and commensurate reductions in each project's payback period.

Our team will then work closely with the property owner and/or manager to identify project financing, source bids from qualified contractors, oversee project completion, and provide support in ensuring program incentives are received.

Scalability

The Project Coordinator role will be flexible to be able to support some additional capacity for virtual audits. This strategy would help scale up the program internally without any additional investment, however it is a short-term solution and ultimately scaling past a certain point would require additional operating capital. Walker-Miller would work with the City of Ann Arbor during the Program Planning phase to determine the program volumes which would trigger additional capacity requirements.

Should the City of Ann Arbor decide to scale up the HEA Program and allocate more resources to serve more customers, the general team structure presented above is designed to evolve and grow. The Energy Advisor role can expand and be split into Energy Advisor I (EA-I) and Energy Advisor II (EA-2) roles, where EA-1's continue to provide virtual assessments, and the EA-II's primarily perform field assessments while remaining flexible to support virtual assessments as needed. In this scenario the Program Manager will evolve to take on more program and team management, and less time spent working with customers performing in-person assessments.

If program interest is high and the rate at which the program is receiving inquiries from interested households exceeds the budgeted resources of the program, Walker-Miller has extensive experience ways of respectfully dealing with waitlisting customers. Managing waitlists for the DTE Energy MF and HEC programs each required a unique approach to ensure customer satisfaction. The two brief case studies below illustrate our ability to address these issues. Our team would draw from these experiences during the start-up phase to fine tune details around waitlisting processes for the HEA Program.

DTE Multifamily Program: In 2018, the MF program experienced increased demand for prescriptive incentive funding because of our outreach efforts and prior year spillover. Both electric and gas incentive funding was fully reserved prior to the end of the program year. We established and carefully managed a waitlist, based on the Application Submitted Date

recorded in our database. As additional funding became available, the project with the earliest Application Submitted Date was given the opportunity to reserve incentive funds. To maintain ongoing and clear communication with the market, we distributed waitlist letters to customers and trade allies outlining the process and what to expect. Additionally, we referred eligible projects to the DTE Energy C&I program when possible, to ensure customer satisfaction.

DTE Home Energy Consultation Program: Colder temperatures in Q4 2018 drove increased demand for Home Energy Consultations throughout the state, spurring the need for an HEC program waitlist to level-set homeowner expectations while maintaining overall satisfaction. A secondary objective of the waitlist was to strategically control remote versus dense population territory scheduling. To prepare our program staff, a newsflash was distributed internally prior to waitlist implementation. The waitlist started the first week of December, and all customers were contacted and scheduled by the second week of January.

Data Management and Program Tools

- **Proposed data management platforms and CRMs**
- **How and when data and materials will be delivered to the City**
- **Proposed Communication + Coordination / Working Relationship with City**

Walker-Miller plans to make use of several data management tools throughout the implementation of the Home Energy Advisor program. We will use these tools will be used for scheduling and internal communications, data management and analysis, tracking program performance, capturing assessment data, and generating reports.

Snugg Pro: Snugg Pro is a cloud-based, BPI-2400 compliant energy auditing and modeling tool which is used by over 80 utility and government programs across the country. This software was used by the City of Ann Arbor in the pilot phase of the HEA Program, and Walker-Miller is proposing to utilize it for the administration of the full program. Snugg Pro uses the OptiMiser energy modelling engine to suggest recommendations and estimate costs and energy savings based on energy collected during an energy assessment. Snugg Pro offers the availability to customize report templates and includes a myriad of incentives and rebates which can be added to customized reports.

Microsoft Outlook – Calendar and Email: The HEA Program team will utilize Microsoft email and calendar for internal communications as well as for scheduling assessments and follow-ups.

Microsoft SharePoint: Program data and administrative documents and files will be stored on Walker-Miller's secure SharePoint servers.

Microsoft Power BI: Microsoft Power BI dashboards are developed and directly populated with data from Snugg Pro. Tables, graphs, and geo-coded interactive maps containing the locations of each consultation are available within each dashboard. KPIs displayed in relation to their respective forecasts allow for consistent trendline tracking. Every component of these dashboards is customizable to suit the needs of the city. Viewing access for each dashboard can be limited as preferred or needed. Examples of Power BI dashboards built by Walker-Miller and utilized in previous program implementation are shown below in Figure 3 and Figure 4 below. We will work with the City to revisit and update as needed any specific reporting metrics, formats, and frequency. Walker-Miller Team staff will continue to provide progress reports in the City's preferred format and timelines.

Microsoft Dynamics - Walker-Miller uses Microsoft Dynamics to track leads, manage customer interactions and journeys, and manage customer data. Dynamics will be used to perform these functions and any other customer tracking / CRM functionality the HEA Program requires.

Program Microsite: Walker-Miller will create and maintain a web-based microsite that will provide customers resources on home decarbonization, program information, contact information, and metrics demonstrating program impact. This site will also allow customers to submit program inquiries and sign up for more information about virtual or in-person assessments.

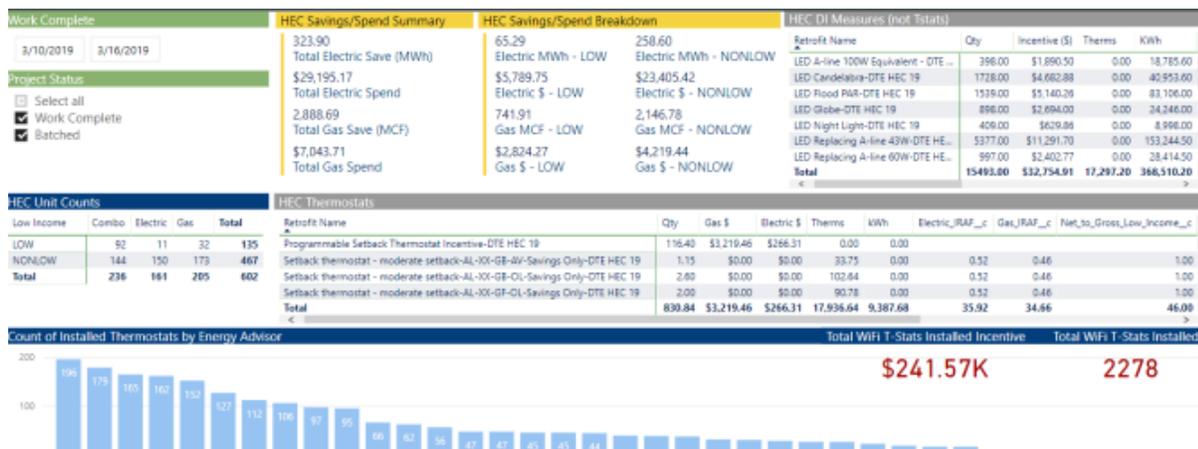


Figure 3: Example W-M Generated Power BI Dashboard

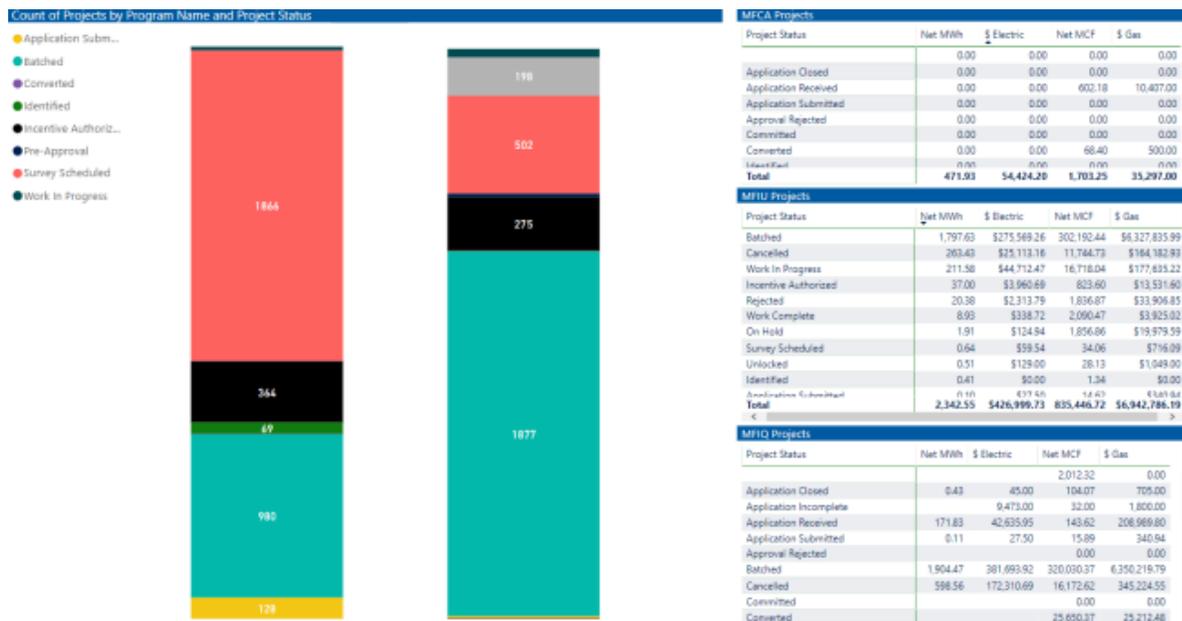


Figure 4: Example W-M Generated Power BI Dashboard

Weekly program activity will be provided through a user-friendly Power BI dashboard along with forecasted progress towards program goals. Any shortfalls within forecasts are also documented regularly with counter-strategies and anticipated recovery timelines. On an ongoing basis we update any milestones set during the start-up phase based on actual results achieved to date.

Our team includes information management and information technology professionals with decades of experience connecting our systems to those of clients and partners. We have direct experience using APIs to connect to outside software for the regular transfer and updating of data. We currently interface program data with many client systems. Our systems and methods allow for a smooth conversion process from the existing system to our platform and back using our data integration methodology, and real-time, online access to all program data for our clients. Fast, efficient, and reliable data transfers/ replication will provide for synchronization of all program data with the City of Ann Arbor.

Marketing and Outreach

- **Proposed outreach and engagement techniques**

Walker-Miller will identify key messages and materials that humanize the organization's approach to assisting communities and tell compelling stories to result in engagement. A marketing and outreach plan developed during the start-up phase will detail any marketing and outreach campaign tactics that can be deployed to achieve program goals with associated collateral, print materials, digital elements, outreach procedures, potential partners, and events. The following sections speak to our general approach and experience driving program participation with other clients, which will be drawn upon when working with the City of Ann Arbor to develop a plan for the HEA Program.

Outreach

Walker-Miller believes in casting a wide net, especially at the onset of outreach efforts. A key avenue for past successful outreach efforts has been community events. Walker-Miller identifies high-potential community events through community partners, websites, social media platforms, and public networking forums. We also further directly gauge solutions on hand in the context of community need by attending inter-agency meetings and connecting directly with local organizations throughout the City of Ann Arbor.

Walker-Miller's outreach prioritizes identifying and building relationships with community organizations that assist families with utility bills, rent payments, child and elderly care, credit counseling and other social services. By building these relationships first we are able to clearly illustrate the benefits of energy efficiency to community organization leadership and our team, gaining trust through understanding each other's goals and value to the community. Through the cultivation of these trusted relationships, we facilitate greater access to energy efficiency programs and increase participation in local communities.

In planning outreach efforts to best serve economically distressed communities, Walker-Miller routinely identifies and reaches out to community action agencies, food banks, food pantries, faith-based organizations, block clubs, civic organizations, and other groups to collaborate on delivering energy efficiency program opportunities throughout these organization's orbits.

In our past work implementing energy efficiency programs Walker-Miller has emphasized the importance of building individual stakeholder relationships to establish points of contact for each organization. Walker-Miller has found success by conducting recruitment information sessions to showcase program objectives and the importance of the organization's role in program recruitment. These initial efforts have been complemented by regular follow-up and support requests to ensure progress toward program goals.

Relationship Building

Relationship building within the communities we serve is a cornerstone of Walker-Miller's success. Driven by our mission to empower people and enrich communities, we place an emphasis on relationship building through multiple pathways and targeted activities.

As touched on in the Outreach Section – prior to entering a community, Walker-Miller researches the needs of specific demographics in the selected region of service territory. These research efforts provide the foundation for our relationship building and key context for our program outreach strategies.

Early on in engagement activities, Walker-Miller identifies community leaders in targeted underserved communities. These early conversations with community leaders carry deep benefit as these relationships contribute directly to the organization of, support for, and participation in networking events to boost program awareness and deepen community-wide relationships.

As a next step from connecting with leaders to building relationships with individual community members, Walker-Miller has delivered virtual and in-person presentations, drive-thru events, webinars, online and in-person conferences, bill pay assistance events, and library-based events. Walker-Miller is particularly proud of our booth exhibits, catered lunch & learns, grab-n-go bags, and interactive kiosks. These quick interactions both honor community members' precious time while creating strong first impressions. To continue building relationships, as well as heighten utility brand awareness, Walker-Miller can host or cosponsor grassroots-style events such as neighborhood block parties with program-connected non-profits. Cultivating and strengthening relationships with community partners through sponsorships, giveaways, and repeat visits has been an essential part of Walker-Miller's relationship building strategy. An additional element of building relationships both with individual organizations and between all participating organizations is consistent program updates featuring program information and success stories.

D. Fee Proposal

Please see separate fee proposal package for our full fee proposal.

The referenced key staff is available above in Section A of this proposal.

Additional Notes:

Walker-Miller Energy Services acknowledges the receipt of Addenda 1 and Addenda 2 for RFP 23-49.

F. Schedule of Attachments

Attachment B: Signed Legal Status of Offeror

Attachment C: Signed City of Ann Arbor Declaration of Compliance: Non-Discrimination Ordinance

Attachment D: Signed Living Wage Ordinance Declaration of Compliance

Attachment E: Signed Vendor Conflict of Interest Disclosure Form

Attachment F: Walker-Miller Team Resumes

**ATTACHMENT B
LEGAL STATUS OF OFFEROR**

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

The Respondent is:

- ~~• A corporation organized and doing business under the laws of the state of _____, for whom _____ bearing the office title of _____, 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 Michigan, whom Carla Walker-Miller bearing the title of Chief Executive Officer 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.

 Date: October 2, 2023

Signature _____

(Print) Name Carla Walker-Miller Title CEO

Firm: Walker-Miller Energy Services

Address: 8045 2nd Ave., Detroit, MI 48202

Contact Phone (313) 366-8535 Fax (313) 366-4946

Email walkermiller@wmenergy.com

**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.

Walker-Miller Energy Services
Company Name

10/2/2023
Signature of Authorized Representative Date

Carla Walker-Miller
Print Name and Title

8045 2nd Ave.
Address, City, State, Zip

walkermiller@wmenergy.com
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

**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.

Walker-Miller Energy Services
Company Name

8045 2nd Ave.
Street Address


Signature of Authorized Representative

10/2/2023
Date

Detroit, MI 48202
City, State, Zip

Carla Walker-Miller, CEO
Print Name and Title

(313) 366-8535/ walkermiller@wmenergy.com
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 <hr/> <input type="checkbox"/> Interest in vendor's company <input checked="" type="checkbox"/> Other (please describe in box below)
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:		
Walker-Miller Energy Services	(313) 366-8535	
Vendor Name	Vendor Phone Number	
	10/2/2023	Carla Walker-Miller
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

Ben Dueweke

Director of Community Partnerships



Ben works with a diverse range of stakeholders to advocate for better policy, provide technical assistance and program support to non-profit and community organizations, and educate people on the importance of energy waste reduction and clean energy. In this role, he is responsible for developing and maintaining relationships with the company's existing partners, identifying, and pursuing new opportunities and strategic relationships, and overseeing projects and initiatives that support these goals. His long tenure at Walker-Miller has also included energy efficiency program management, workforce development, and business / market development.

Related Experience

- Michigan Saves Revolving Loan Fund: Oversaw program aimed at working with customers to develop scope of work, as well as procure and manage contractors to perform energy efficiency retrofits using a creating grant / loan product from MI Saves.
- Sinai Grace Guild CDC: Oversaw the 'Weatherize Northwest' program, which leverages CDFI funding to help seniors age in place through energy efficiency.
- United Way of SE Michigan: Oversaw a program aimed at training unemployed and underemployed Detroiters on the principles of building science and energy assessments. This work led to Ben standing up a full Workforce Development team at Walker-Miller.
- Detroit Green Task Force: Energy Waste Reduction Committee (Co-Chair) Launched the EWRC in spring 2019 as a platform for energy stakeholders to convene and develop/advocate for policy aimed at increasing access to EWR programs in Detroit. Previously involved with the Renewable Energy Committee. Actively developing / researching two policies.

Education

BS, Civil Engineering
Michigan State University – 2011

Lean Six Sigma Yellow Belt – 2021
Sig Sigma Global Institute

Walker-Miller Hire Date

February 2013

Experience with Other Firms

Staff Civil Engineer, Giffels, LLC/ IBI
Group – 1 year

Civil Engineering Intern, C2AE – 1 Year

Cameron Seeley

Portfolio Manager



As a Portfolio Manager at Walker-Miller Energy Services, Cameron is primarily responsible for dual program oversight of both the DTE Home Energy Consultation and Multifamily program offerings. Cameron ensures strong customer and client service through process management, financial forecasting, data analysis, and cross-team collaboration.

Related Experience

- Successfully led and managed three residential utility programs with an annual cumulative budget of \$23,000,000 and a team of 50 indirect and direct reports
- Achieved all DTE Energy 2020 program year contractual KPIs during a shortened 9-month program year due to the COVID-19 pandemic
- Acted as a point person for the delivery of all key process, technology, and tool enhancements for a 2018 pilot Home Efficiency Income Qualified Program offered by Ameren Illinois utility resulting in all KPIs met 6% under allocated budget
- Strong experience with ArcGIS, database management, and strategic mapping
- Consistent collaborator with Lead Energy Engineer to improve Program Measure Build ensuring ongoing target fulfillment
- Proficient in leading programs to achieve quantifiable results on time and within budget in high-stress environments

Education

BS, Earth and Environmental Science
University of Michigan
Ann Arbor, MI

Lean Six Sigma Green Belt
Villanova University
Villanova, PA

Walker-Miller Hire Date

February 2018

Experience with Other Firms

National Oceanic Atmospheric
Administration – 2 Years

Center for Social Justice – 3 Years

Curtis Christian

Field Supervisor



Curtis is a Field Supervisor with extensive experience ensuring long-term customer satisfaction by leading teams in providing in-home consultation, education, and assessments for technical products related to HVAC and energy services. He is a dynamic problem solver with a proven ability to quickly learn new concepts while working within fast-paced, high-pressure environments without sacrificing quality goals. Curtis is a dedicated professional skilled at performing with minimal direction and surpassing productivity targets.

Related Experience

- Plan, schedule, and inspect the work of employees engaged in installation, maintenance, and service work
- Oversaw daily coordination and operations for a team of 30 home energy consultants, leveraging strong leadership skills to manage calls from colleagues in the field and customers alike to provide ongoing support with a range of questions or issues.
- Led the interviewing and hiring of eight personnel and assisted with onboarding and training needs.
- Performed customer education on energy efficiency best practices that could help in lowering the cost of utility bills and create greater satisfaction.
- Leveraged strategic planning and thinking to ensure achievement of energy saving goals for DTE three months early despite shortened contract deadline; maintained employee morale and motivation.

Education

Coursework Toward Bachelor of Science (BS), Psychology: Wayne State University

Six Sigma Yellow Belt

Building Analyst Professional – Building Performance Institute (BPI)

Healthy Homes Evaluator – Building Performance Institute (BPI)

Currently Pursuing Front-Line Leader Impact – Center for Creative Leadership

Walker-Miller Hire Date

April 2016

Experience with Other Firms

AT+T – Premise Technician

Lecom Communication – Cable Installation Technician

Darius Fells

Energy Auditor



Darius is an award winning, client-focused experience professional seeking career advancement opportunity with the ability to clearly articulate information to customers, staff, and executive teams. He is a flexible, self-starter able to provide on-call support to a range of programs and staff with key insights for overall program planning. His experience transitioning from the DTE Home Energy Consultation program to supporting more technical energy auditing program including Weatherization Assistance Program is evidence of his adaptability and ability for professional growth.

Related Experience

- Build reputations with multiple programs leading to future partnerships
- Ensuring scheduling, service and performance is beyond expectations within the defined service territory
- Regular contact with customers to resolve service issues and ensure appropriate customer service levels
- Coordination of daily emergency response logistics
- Support and enhance a positive safety culture
- Experience with providing energy waste reduction advice to the community and staff
- Track, monitor, and work to resolve software and technical issues
- Experience with performing a Gas Leak Test in and around the home
- Experience with performing an Ambient Air Test for Carbon Monoxide (CO)
- Experience with performing a Combustion Appliance Zone (CAZ) Testing of all vented combustion appliances
- Experience with performing a Blower Door Test
- Experience with performing a Zone Pressure Diagnostic (ZPD) Test when dwelling has attached or “tuck- under” garage
- Experience with performing Indoor Air Quality (IAQ) Assessments
- Experience with performing Refrigerator Assessments
- Critically think about best ways to keep dwellings health and safety but also Energy Efficient

Education

Building Analyst Professional Certification
Building Performance Institute

Energy Auditor Professional Certification
Building Performance Institute

DOE Certified Home Energy Score Assessor

Lead Awareness Training for General
Industry Certification
OSHA Education Center

Air Sealing & Dense Pack Wall Insulation
Training Certification
Michigan Training & Education Center

ASHRAE 62.2-2016 Training Certification
Michigan Training & Education Center

Walker-Miller Hire Date

February 2016

Experience with Other Firms

Solutions for Energy Efficiency
Logistics – 3 Years

Robert Morton

Energy Efficiency Concierge



Robert is an ambitious and goal driven supervisor with wide-ranging experience as a field manager and auditor in the energy waste reduction industry. He has personally conducted over 500 residential and/or commercial energy assessments as well as installed, inspected, and approved the installation of electric, gas, and water saving products in residential homes.

Related Experience

- Oversees day to day operations of offsite technicians for DTE residential direct install program
- Provides team leadership, coordination, and supervision needed to meet production and quality objectives
- Analyze and benchmark productivity to identify gas/energy saving opportunities.
- Coach and train technicians (average 30) in HVAC and customer service during home visits
- Perform Timely resolution (research and call back) for quality control calls and/or emails.
- Swift communication to team members as well as managers/supervisors and other key stakeholders either verbally and/or in writing.
- Maintain detailed project and program files, prepared program reports and supporting information on program operations and status for effective
- Work closely with dispatch/service desk to reduce the service call ration
- Assess HVAC issues and provided support for tier two technicians
- Train new team members to ensure an extraordinary experience was provided to customer

Education

Building Analyst Professional Certification -
Building Performance Institute

Building Science Principles Certification -
Building Performance Institute

Walker-Miller Hire Date

November 2011

Experience with Other Firms

United States Department of
Commerce – 1 Year

Sean Greenroyd

Microsoft Developer



Recognized throughout career as a passionate, inspirational and determined leader. Motivated by personal discipline and equipped with solid communication and time management skills. Excelled in tool development and data analysis. Acquired comprehensive knowledge of Python, APIs, Power App and Power Automate development and automation.

Related Experience

- Researches, designs, develops, and/or modifies Microsoft tools and systems including SharePoint, MS outlook, MS forms. Power Automate, PowerApps and PowerBI reporting.
- Participates in all aspects of software delivery model: Design, Development, Validation, Delivery, Maintenance
- Defines functional requirements; conduct a detailed analysis of alternative solutions; design system enhancements and interfaces;
- Develops prototype systems to allow for design and requirements changes.
- Documents design and detailed specifications; plan for control, testing, security, and quality assurance.

Education

Walker-Miller Hire Date

July 2023

Experience with Other Firms

Systems Technology Group – 10 years

Sleepy Giant – 2 years

NHN USA – 5 years