

# Power Wise<sup>TM</sup>



**2024 Cleco Residential Solutions Energy Efficiency Program**

**2024 LA Quick Start Phase I  
Program Year 10 (“PY10”)**

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# 1. Weatherization Program Objective

The objective of Cleco's Residential Solutions Program (Program Year 10) (the "Program") is to offer certain residential customers opportunities to save energy through education, services, incentives, rebates and access to energy service providers (i.e., Project Sponsors) who install energy efficiency measures under the Program. This document explains the Program and associated incentives (paid to Project Sponsors) and the processes and requirements related to the Program.

## Key Program Changes and Guidelines

This manual has been created to provide information solely for Cleco's Residential Solutions Program.

### Key Changes for the Program in 2024

- Work may be performed from the effective date of the Program Master Agreement (January 15th) through and including November 15th, 2024, or when Program funds are depleted.
- New Residential Heating Program
- Email addresses are mandatory for all projects
- Calendar entries must be entered before the day of the project
- Required to send the customer invoice within 5 business days of reaching *Approved* status in P3
- All photo submissions for projects need to be in jpg/jpeg. HEIC will not be accepted.
- All incandescent bulbs that are replaced with installed LEDs must have geotagged photograph(s) showing all the incandescent bulbs with a clear view of the count. The photo will need to be uploaded directly in the measure.
- All required photos MUST contain a geotag displaying the location, time, and date that the photo was taken to be considered for payment.

### Key guidelines for the Program in 2024 include:

- Each Project Sponsor will have a budget cap that limits the maximum amount of incentives that a single Project Sponsor may be eligible to receive under the Program. This budget cap will be determined at the sole discretion of Cleco and will be based on the Project Sponsor's prior residential program experience, historical performance, and budget availability. The budget cap is a limit and NOT a guaranteed Project Sponsor budget allotment. Cleco reserves the right to increase or decrease, in its sole discretion, each Project Sponsor's budget cap.
- Project Sponsors shall provide Cleco customers with a positive customer experience, including the satisfactory resolution of any customer complaints.
- Each Project Sponsor can submit Projects until its respective Project Sponsor budget is fully utilized or all Program funds have been depleted, subject to any Project submission cutoff dates or budget adjustments made in Cleco's sole discretion.
- Project Sponsors with NO previous Cleco Power LLC residential program experience will start with a cap of no more than \$5,000.
- Project Sponsors are responsible for ensuring there are ample funds in the Program and their respective budgets before installing measures in customer's homes.

- All approved Project Sponsors are required to upload job-related paperwork (Residential Participant Agreements, Field Notes Forms) into the P3 database. **Paper documents are NOT accepted.** All documents should be in the form of a .pdf file and all images should be compressed and zipped into one Before and After folder for project if possible.
- Cleco will provide each customer with a post-install survey via electronic mail or by hard copy provided through a Program Consultant.
- A currently certified Home Energy Rater (HERs), Residential Energy Services Network (RESNET) or Building Performance Institute (BPI) individual is required to be on staff for any Project Sponsor performing Duct Efficiency and/or Air Infiltration measures. HERs, RESNET or BPI individual required to be listed on Project Sponsor application.
- Each Project Sponsor must carry all statutorily required insurance and all insurance required under its Program Master Agreement.
- Current year calibrated equipment certificates and serial numbers are required for the program year.
- Each Project Sponsor will be provided a budget cap that limits the maximum amount of incentives that a single Project Sponsor may be eligible to receive under the Program. The budget cap may be adjusted at any time in Cleco's sole discretion (notice of such adjustment will be provided to the applicable Project Sponsor). The Program budget will be evaluated regularly to verify the budget cap assigned to each Project Sponsor. When the overall Program budget is raised, all Project Sponsors will be notified via email.
- Duct and air leakage testing should **not** be conducted in homes where either evidence of asbestos, mold and/or other potentially hazardous material is present or suspected due to the age of the home. Blower door depressurization tests are **prohibited** if there is a risk of asbestos becoming airborne and being drawn into conditioned space.
- A qualified Program representative will perform random pre/post inspections to verify the accuracy of reported blower door and duct blast readings.
- All ceiling insulation installations must affirm that an insulation installation certificate was permanently affixed near the attic opening.
- Electric cooling must be present for any shell measures to qualify for incentives.
- The program manager has the authority to cancel/delete any Project entered into P3 and not submitted within thirty (30) days after such entry.
- Single-Family work schedules are required for all Project Sponsors completing Duct Efficiency, Infiltration measures and/or ceiling insulation.
- All use of marketing, including social media, must be approved by Cleco.
- All Project Sponsors are required to bring their own tools needed for assessments and work conducted within the premise.
- All Project Sponsors are required to provide a professional experience for the customer. This includes conducting good housekeeping practices during and after all work. This includes using drop cloths, wearing shoe covers, etc. This also includes refraining from the use of profanity or vulgarity on the customer premise. Project Sponsors must remember that they are representing Cleco.
- All Cleco Power Wise correspondence will be sent to [energyefficiency@cleco.com](mailto:energyefficiency@cleco.com) instead of sending to individual team members. This email is accessible to all Cleco Power Wise Staff and will produce the quickest response to your request.
- Project Sponsors are not allowed to use telemarketing of any kind to promote energy efficiency services to Cleco customers. **Any use will result in immediate termination from the Program.**

Although Cleco has summarized key Program changes and requirements here, it is the Project Sponsor's responsibility to review this Program Manual and each document referenced herein in its entirety prior to submitting an application. It is also the Project Sponsor's responsibility to review the program's Best Practice Installation Standards (Best Practices) for all measures being installed. **EACH PROJECT SPONSOR MUST SIGN THE PROJECT SPONSOR ACKNOWLEDGEMENT FORM TO CONFIRM THAT IT HAS READ AND AGREES TO COMPLY WITH ALL REQUIREMENTS AND PROCEDURES SET FORTH IN THIS PROGRAM MANUAL AND THE BEST PRACTICES.**

**CLECO RESERVES THE RIGHT TO INCORPORATE ANY AND ALL CHANGES RESULTING FROM THE LOUISIANA PUBLIC SERVICE COMMISSION'S PROCEEDINGS INTO CLECO PROGRAMS AS THEY ARE APPROVED, WHICH INCLUDES THE RIGHT TO UPDATE, AMEND OR MODIFY THIS PROGRAM MANUAL, ALL DOCUMENTS REFERENCED HEREIN AND ANY OTHER PROGRAM MATERIALS, WITHOUT THE CONSENT OF ANY PROJECT SPONSOR, AS MAY BE REQUIRED IN CLECO'S SOLE DISCRETION TO COMPLY WITH ANY SUCH CHANGES. MOREOVER, CLECO RESERVES THE RIGHT TO UPDATE, MODIFY OR AMEND THIS PROGRAM MANUAL AND ANY OTHER PROGRAM DOCUMENTS, MATERIALS OR PROCEDURES FROM TIME TO TIME, FOR ANY REASON, IN CLECO'S SOLE DISCRETION. CLECO WILL MAKE REASONABLE EFFORTS TO PROVIDE PROJECT SPONSORS WITH ADVANCE NOTICE OF ANY CHANGES AFFECTING THEIR PROJECTS AND OF UPDATES, AMENDMENTS OR MODIFICATIONS TO THIS PROGRAM MANUAL OR OTHER PROGRAM DOCUMENTS.**

## **2. Weatherization Program Design**

### **Program Description**

The primary objective of this Program is to achieve a cost-effective reduction of energy ("kWh") and peak summer demand. This performance-based retrofit program offers incentive payments for "deemed" or "measured" energy savings generated by installing energy efficient measures.

Approved Project Sponsors are responsible for verifying that there are available funds both in the overall Program budget and under their respective Project Sponsor budget caps, marketing their services to Cleco customers, contracting with the customer, installing Measures, and reporting their work to Cleco. Cleco will inspect a sample of installed Measures determined in its sole discretion. Payment is made for Peak Demand Savings and/or Energy Savings based on the percentage of installations that are approved by Inspection as capable of delivering the reported savings.

**CLECO HAS DESIGNED THIS PROGRAM MANUAL TO PROVIDE PROJECT SPONSORS WITH THE SPECIFIC REQUIREMENTS OF THE PROGRAM. BY CONTRACTING WITH CLECO,**

**PROJECT SPONSORS AGREE THAT THEY HAVE READ THIS PROGRAM MANUAL AND ALL DOCUMENTS REFERENCED HEREIN, INCLUDING THE BEST PRACTICES, AND WILL COMPLY WITH THE REQUIREMENTS OF THE PROGRAM IN ALL RESPECTS. BY PARTICIPATING IN THE PROGRAM, A PROJECT SPONSOR ACKNOWLEDGES AND AGREES THAT CLECO'S PAYMENT OF INCENTIVE PAYMENTS IS (A) CONDITIONED UPON ALL TERMS, CONDITIONS AND PROCEDURES OF THE PROGRAM AND SUCH PROJECT SPONSOR'S COMPLIANCE THEREWITH AND (B) SUBJECT TO ALL OTHER APPLICABLE LIMITATIONS PROVIDED FOR IN THIS PROGRAM MANUAL, THE PROGRAM MASTER AGREEMENT AND THE OTHER PROGRAM DOCUMENTS.**

## **Project Sponsor Eligibility**

A Project Sponsor is any person, organization, group, or individual who contracts with Cleco under a Program Master Agreement to provide Energy Savings and/or Peak Demand Savings by installing Measures under the terms of this Program Manual. The following types of organizations are among those eligible to participate as Project Sponsors:

- Energy service companies
- Local contractors
- National or local companies that provide energy-related products (e.g., insulation or HVAC)
- Product retailers if they install the particular energy-efficient products sold as part of this program.

### **Requirements:**

- Project Sponsors must meet minimum program eligibility criteria and demonstrate their financial, technical, and managerial qualifications.
- Any subcontractor must be identified in the Program Enrollment Materials. A subcontractor can be added at a later date with Program administrator approval. Project Sponsors and their subcontractors are required to carry all statutorily required insurance and any other insurance required by the Program Master Agreement or other Program documents.
- A currently certified HERs, RESNET or BPI individual required to be on staff for any Project Sponsor performing Duct Efficiency and/or Air Infiltration measures. HERs, RESNET or BPI individual required to be listed in the Program Enrollment Materials.

## **Participant Eligibility**

All participants must be residential customers of Cleco Power LLC as identified by the use of the meter number. Cleco meter numbers are located on the billing detail section of the electric bill and may be found in the lookup feature within the P3 Premise modal. Dwellings in major disrepair that result in less than an expected 10-year life will be considered not eligible.

Participants may include:

### **Residential customers:**



**Single Family** – Defined as residential properties consisting of four or fewer premises or addresses under a continuous roof.

**Multi-Family** - A residential property containing five or more premises under a continuous roof, five or more premises under the same address, or a community of 5 or more premises managed or owned by a single management facility or corporation (ex. HUD properties).

- **Individually metered multi-family buildings** - Considered separate residential accounts; each unit is counted as a residence; the common areas are considered commercial accounts and are not eligible for the Program.
- **Master-metered multi-family buildings** - Considered commercial facilities and are not eligible for the Program.

NOTE: Project Sponsors must request pre-approval for multi-family facilities with 20 units or more AND provide a work schedule at least seven (7) days prior to measure installation. Pre-approval is done via the P3 database. **No work may begin at a multi-family Project with 20 units or more prior to Cleco approval of the site and work schedule.**

### **Residential Income Qualified Program**

Residential Income Qualified are residential customers served by Cleco with an annual household income at or below 200% of the federal poverty guidelines and who have properly completed an approved income verification form.

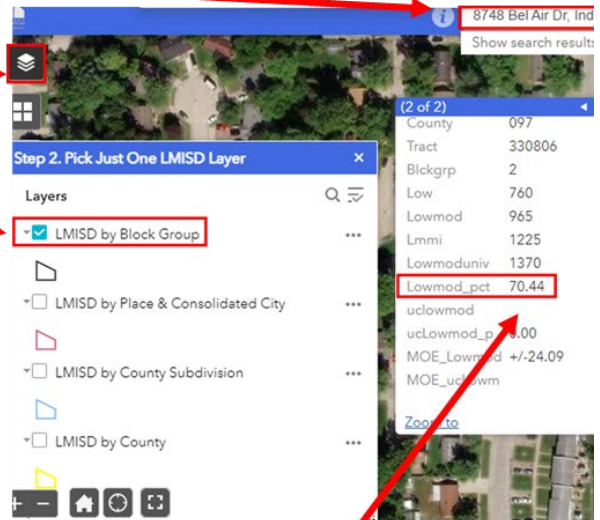
Dwellings in major disrepair that result in less than an expected 10-year life are not eligible. The U.S. Department of Health and Human Services (HHS) Poverty Guidelines are established separately for households of different sizes.

#### **Income Eligibility Verification (for IQ participants only)**

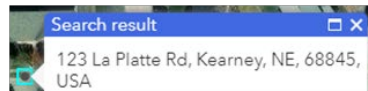
The Project Sponsor will qualify the customer one of four ways:

1. Using Low Mod Income Summary Data (LMISD) - [LMISD Web Tool](#). Screenshot of eligibility must be uploaded into project.

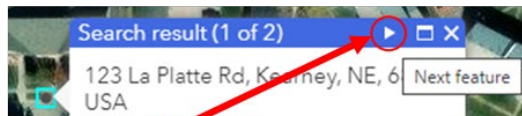
1. Click link for [LMISD Web Tool](#)
2. Enter premise address & press enter
3. Click the Layer Icon
4. Uncheck all layers except “LMISD by Block Group”
5. Click on center of blue square enabling LMISD features ► (see below).



a) Before clicking inside blue square



b) After clicking inside blue square

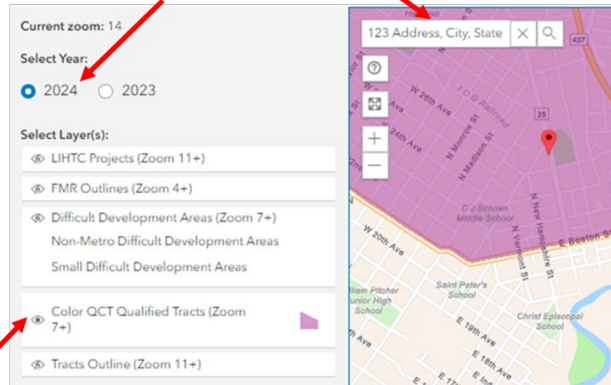


6. Click ► then scroll down to find Lowmod\_pct field
7. If Lowmod\_pct is greater than or equal to 51.00, then the premise is eligible for Income Qualified program
8. Include a screenshot of the result showing premise address, LMISD layer & Lowmod\_pct in P3

2. **Using Development Qualified Census Tracts (HUD QCT) - [HUD QCT Tool](#). Screenshot of eligibility must be uploaded into project.**

- a. Go to: [HUD QCT Tool \(https://www.huduser.gov/portal/sadda/sadda\\_qct.html\)](https://www.huduser.gov/portal/sadda/sadda_qct.html)

- a. Go to: [HUD QCT Tool](#)
- b. Enter premise address & press enter
- c. Select current year: 2024



- d. Select Layer: Color QCT Qualified Tracts
- e. Include screenshot showing premise located within purple shaded.

If the Project Sponsor cannot verify the customer through the above two websites, they will present the form to the customer, and she/he will check appropriate boxes, provide other information where information is required and sign the form. It is not the Project Sponsor's responsibility to verify the information provided by the participants.

3. **Self-Certification Form of Income Eligibility:** To document a single-family customer's income eligibility status, the Project Sponsor must have the participant complete and sign the Self Certification Form of Income Eligibility.
4. **Property Owner Certification Form of Tenant Income Eligibility:** If a Project Sponsor is implementing a project at a multi-family building, the Project Sponsor must have the property owner or agent complete and sign the Property Owner Certification Form of Tenant Income Eligibility verifying that at least 75% of the units are rented by income eligible customers with each unit having a separate electric meter.

## Energy Efficient Measure Eligibility

Eligible measures have been approved in the Arkansas TRM (link will be placed on Cleco’s website) and are assigned a Deemed Savings value that may be used to determine the amount of an Incentive Payment. Tables 1 and 2 in this section provide lists of eligible and ineligible measures, based on the approved Deemed Savings. The Arkansas TRM provides the corresponding Deemed Savings and installation requirements (in all cases the installation requirements of the Best Practices must also be satisfied, if applicable).

If any of the baseline equipment at a Project Site has been removed, or if any of the proposed energy efficient measures have been installed prior to the execution of the Program Master Agreement or the Residential Participant Agreement, the entire Project will be disallowed.

This is a retrofit program, where the residential dwelling must be over two years old (built before January 1, 2022). Measures can be installed only once every ten years.

**Cleco shall have final authority, in its sole discretion, to determine whether any particular measure is eligible for incentives.**

**Table 1 – Eligible Measures**

<p><b>Envelope Measures</b> For eligible single family (including mobile homes) and multi-family Projects at least 2 years or older</p>	<ul style="list-style-type: none"> <li>• Ceiling Insulation*</li> <li>• Air infiltration</li> <li>• Duct Sealing</li> </ul> <p><b>*Excluding first floor ceilings in multi-level multi-family buildings</b></p>
<p><b>Direct Install Measures</b> Direct install measures are secondary measures for single family Projects and primary measures for multi-family Projects.</p> <p>Low flow shower heads and faucet aerators may be installed only if premise has electric water heating</p>	<ul style="list-style-type: none"> <li>• ENERGY STAR LED Bulbs: A19 &amp; BR30* <ul style="list-style-type: none"> <li>○ LEDs up to 60-Watt equivalent may be installed.</li> <li>○ Limit of 30 LEDs may be installed per premise</li> <li>○ LEDs will only be installed in permanently affixed fixtures including exterior lights.</li> <li>○ LEDs may not be installed in areas such as closets and rarely used light fixtures.</li> <li>○ LEDs must be ENERGY STAR certified and labeled.</li> </ul> </li> <li>• Low flow shower heads <ul style="list-style-type: none"> <li>○ max of 2 showerheads per premise</li> <li>○ Existing gpm is 2.5</li> </ul> </li> <li>• Faucet aerators <ul style="list-style-type: none"> <li>○ max of 3 aerators per premise</li> <li>○ Existing gpm is 2.5</li> </ul> </li> </ul> <p><b>*Project Sponsor is required to use bulbs, low flow shower heads and faucet aerators from Cleco’s approved vendor, AM Conservation. The count between both LED measures must not exceed 30 total.</b></p>

<b>Equipment Rebates</b>	<ul style="list-style-type: none"> <li>• ENERGY STAR Pool Pump</li> <li>• ENERGY STAR Geothermal Heat Pump</li> <li>• ENERGY STAR Room Air Conditioner</li> <li>• ENERGY STAR Smart Thermostat</li> <li>• Heat Pump Water Heater</li> <li>• Electric Tankless Water Heater</li> <li>• New Home Construction Equipment Rebate</li> </ul>
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**Table 2 – Examples of Ineligible Measures**

CFLs (compact fluorescent lights)
Hard-wired fluorescent light fixtures
Measures installed at residential dwelling projects (completed after January 1, 2020)
Cogeneration and self-generation Projects
Load shifting/load management measures
Load reductions caused by building vacancies
Measures that rely solely on customer behavior or require no capital investment
Measures that decrease building plug loads, such as “Green Plugs” or computer inactivity time-out controls
Measures for which incentives were received under another Cleco program
Repair and Maintenance Projects
Energy-efficient gas measures when replacing non-electric technologies
Measures that result in negative environmental or health effects
Measure installed on hobby shops, or other limited use buildings
Measures that have been installed at the same location in the last ten years
Photovoltaic (PV) or other distributed generation measures
Insulation in first floor ceilings in multi-level multi-family buildings

**Envelope Measures**

**At least one of the three following measures must be installed in order for secondary measures to be eligible. The secondary measures must be installed in conjunction or at the same time as primary measures. Multi Family Projects are allowed to have secondary measures installed as primary measures.**

- Insulation measures (insulate the ceiling). Photographs required.
- Air infiltration control measures (there is an upper limit of 4.0 CFM50 per square foot of house floor area pre-retrofit infiltration rate.) Photographs required as stated in the Program’s Best Practices.
- Duct sealing. Photographs required.

**Duct Sealing Incentive Cap Limit**

Duct Sealing will have a maximum incentive cap of \$1200.00 per premise.

**General Information**

Each Project Sponsor participating in the Program may only submit Projects up to such Project Sponsor's budget cap, which limits the maximum number of incentives that a single Project Sponsor may be eligible to receive under the Program. This cap is not a guaranteed amount. Moreover, such a cap may be increased or decreased by Cleco's Program manager. It is the responsibility of the Project Sponsor to monitor the overall Program budget and its Project Sponsor budget cap to determine whether there are ample funds before installing any measures.

- **First-time Project Sponsor Budget Cap:** \$5,000 (Cap can be raised or lowered at the discretion of Cleco's Program manager once work quality is reviewed and passes inspection).
- **Experienced Cleco Project Sponsor Budget Cap:** \$25,000 (Limit can be raised or lowered at the discretion of Cleco's Program manager).

The total Project Sponsor budget cap limit (including any raises discussed above) for a single Project Sponsor is further described in Section 3 of this Program Manual.

Projects can be submitted until the Project Sponsor budget cap is reached or all Program funds have been used, subject to any Project submission cutoff dates or budget cap adjustments made in Cleco's sole discretion. Funds will be taken out of the Program budget upon the submission of a Project. Please note that when funds reach zero in the program, there is no guarantee that Cleco will be able to pay incentives on non- submitted Projects.

### 3. Weatherization Program Incentives

Cleco shall pay Project Sponsors a fixed incentive per kW and kWh of savings as determined by the approved demand and energy savings formulas in the Arkansas TRM. Demand (kW) payment is based on Peak Demand Savings and Energy (kWh) payment is based on the first-year Energy Savings. All Incentive Payments shall be made directly to the Project Sponsor, not customers. Project Sponsors are not required to provide any direct incentives to customers but are required to execute a Residential Participant Agreement (RPA) with the customer that indicates the Project Sponsor is participating in a Cleco program and will receive an incentive.

#### Incentives by Measure

To provide a more comprehensive program, Cleco will pay incentives by measure for weatherization measures as shown in Table 3, Income Qualified Weatherization Measures in Table 4, equipment rebates in Table 5 and direct install measures in Table 6.

**Table 3  
Cleco Single Family Residential Weatherization Program  
Incentive Rates by Measure**

Residential Program Incentive Rates by Measure	Ceiling Insulation R-0 to R-4	Ceiling Insulation R-5 to R-8	Air Infiltration	Duct Sealing
	<b>\$/SqFt Installed</b>	<b>\$/SqFt Installed</b>	<b>\$/CFM50</b>	<b>\$/CFM25</b>

Electric Resistance	\$0.60	\$0.39	\$0.25	\$1.75
Gas	\$0.60	\$0.39	\$0.25	\$1.75
Heat Pump	\$0.60	\$0.39	\$0.25	\$1.75

**Table 4  
Cleco Income Qualified Residential Weatherization  
Incentive Rates by Measure**

Income Qualified Residential Weatherization	Ceiling Insulation R-0 to R-8	Air Infiltration	Duct Sealing
	<b>\$/Sqft Installed</b>	<b>\$/CFM50</b>	<b>\$/CFM25</b>
Electric Resistance	\$1.00	\$0.40	\$2.25
Gas	\$1.00	\$0.40	\$2.25
Heat Pump	\$1.00	\$0.40	\$2.25

**NOTE: CLECO MAY MODIFY ITS INCENTIVE PAYMENTS DURING THE PROGRAM YEAR IF IT IS DEEMED NECESSARY IN CLECO'S SOLE DISCRETION TO MEET ITS GOALS OR TO COMPLY WITH ANY LOUISIANA PUBLIC SERVICE COMMISSION PROCEEDINGS OR RULES. CLECO WILL MAKE REASONABLE EFFORTS TO PROVIDE ADVANCE NOTICE TO PARTICIPATING PROJECT SPONSORS BEFORE ANY SUCH CHANGE IS MADE.**

**Table 5  
Cleco Residential Energy Efficiency Program  
Equipment Rebates**

<b>Equipment Rebates</b>	<b>Rebate Incentive</b>	<b>Must meet all requirements listed on individual equipment rebate application to qualify</b>
<b>ENERGY STAR SMART Thermostat</b>	1 <sup>st</sup> Thermostat: Up to \$75.00* 2 <sup>nd</sup> Thermostat: Up to \$25.00*  <i>*Rebate incentive amount per thermostat cannot exceed the actual cost of the thermostat.</i>	<i>Smart Thermostats purchased through the Marketplace are not eligible for an additional rebate as the rebate was already received at the time of purchase.</i>
<b>ENERGY STAR Pool Pump Variable speed</b>	\$250.00	Variable Speed Only; Maximum 2 per service address; See <a href="#">Rebate Application</a> for additional qualifications & limitations
<b>Geothermal Heat Pump</b>	\$1,500.00	1 Maximum per service address; See <a href="#">Rebate Application</a> for qualifications &

		limitations
<b>ENERGY STAR Room/Window Air Conditioner</b>	\$50.00	2 Maximum; See <a href="#">Rebate Application</a> for qualifications & limitations
<b>Water Heater</b>	\$100.00 - Electric Tankless \$400 – Heat Pump	See <a href="#">Rebate Application</a> for qualifications & limitations

**New Construction Power Miser & Power Wise Rebate**

*New construction homes are eligible for up to a \$1,500 rebate and a 10% discount on their electric utility bills from November through April for the first five years in the home.*

**Standards for Qualification : Home must receive service from Cleco, be heated by a qualified central heat pump system, and have all electric water heating.**

Following documentation must be submitted within 60 days of Certificate of Occupancy Issue Date:

1. Completed Verification Form
2. Certificate of Occupancy
3. Clear photo of Energy Guide sticker located on each unit.
4. Clear photo of Building Permit issue date
5. Invoice containing model/serial numbers and an AHRI certificate for both:
  - > Installed water heater
  - > Central heat pump system

**Power Miser \$1000 Rebate  
with 10% Discount on Electric Bill**

**Power Wise \$1,500 Rebate  
with 10% Discount on Electric Bill**



New home must be installed with

- Electric water heater
- Central Heat Pump System with minimum rating:

SEER2 ratings	SEER1 ratings
≥ 14.3 SEER2	≥ 14 SEER

New home must be installed with

- ENERGY STAR certified heat pump water heater
- Central Heat Pump System with meeting the following minimum ratings:

SEER2 ratings	SEER1 ratings
≥ 15.2 SEER2	≥ 15 SEER
≥ 10.6 EER2	≥ 12.5 EER
≥ 8.0 HSPF2	≥ 9.0 HSPF

**Table 6  
Cleco Residential Energy Efficiency Program  
Direct Install Incentives**

Measure Type	Direct Install Measure	\$/unit
<b>Lighting</b>	A19 LED	\$4.00
	Flood BR30 LED	\$6.00
<b>Water</b>	Faucet Aerators	\$5.00
	Low Flow Showerheads	\$15.00

**NOTE: Cleco may modify the equipment rebate payments during the program year if it is deemed necessary IN CLECO'S SOLE DISCRETION to meet its goals or to comply with any LOUISIANA PUBLIC SERVICE Commission proceedings or rules.**

**All rebates must be received by Cleco within 60 days of installation/purchase (specified on each rebate form). If there is an application that is substantially complete and received within the 60-day time frame that is missing documentation, we will review on case-by-case basis.**

**Cleco's payment of REBATES is expressly and specifically conditioned upon (i) CLECO's RECEIPT OF all required notices, submittals and materials within the applicable periods specified in THIS PROGRAM MANUAL AND OTHER PROGRAM DOCUMENTS, (II) CUSTOMER'S COMPLIANCE with all APPLICABLE terms and procedures under THIS PROGRAM MANUAL AND ALL OTHER PROGRAM DOCUMENTS, (III) THE EQUIPMENT AND THE INSTALLATION THEREOF MEETING ALL APPLICABLE PROGRAM REQUIREMENTS AND SPECIFICATIONS, and (IV) AVAILABILITY OF FUNDS UNDER THE PROGRAM FOR PURPOSES OF REBATE PAYMENTS. ALL APPLICABLE EQUIPMENT MUST BE INSTALLED AND REQUESTS FOR REBATE payments MUST BE RECEIVED BY CLECO ON OR BEFORE DECEMBER 31, 2024.**

## Limits on Incentive Payments

### Project Sponsor Limits

A maximum limit on incentives (budget cap) that will be paid to any one Project Sponsor will vary by program.

**Table 7: Project Sponsor Limits**

Project Sponsor Limits	
Residential Solutions	\$100,000
Residential HVAC Program	\$382,000
Income Qualified Program	\$75,000

The above limit is not a guaranteed contract amount. It is an upper limit that a single Project Sponsor may reach if it has demonstrated continued satisfactory performance and the overall Program budget allows. This limit may be waived in Cleco's sole discretion.

**No Project Sponsor has any entitlement or preferential rights to any Program funds for purposes of Incentive Payments or otherwise. Failure to comply with all Program requirements may result in a Project Sponsor's termination from the Program.**

## 4. Weatherization Program Application and Timeline

Cleco's Program website, [www.cleco.com/powerwise](http://www.cleco.com/powerwise) will be the key informational resource for the Program. Project Sponsors should check this website regularly for Program updates. Application forms, instructions, frequently asked questions, and helper applications are also accessible from this website.

### Program Process

1. The following steps are to be followed by all prospective Project Sponsors.
2. Complete the online enrollment for Project Sponsor online from the link located at <https://cleco.p3.enertrek.com> (Project Sponsors must specify which measures they plan to install.)
3. Requests to enter formal enrollment review process and are either approved or denied.
4. Prospective Project Sponsors are notified of approval status.
5. Required contracts (including a Program Master Agreement) are signed with approved Project Sponsors.
6. Only after final enrollment approval and under contract, the Project Sponsors will have a status of 'Approved' in the database. Once approved, and after the official program opening date, the Sponsor is free to market their services to Cleco residential customers, contract with the residential customers, and install the measures.
7. Project Sponsors will initiate, track, and report their work on the P3 database. As each project is approved, the expected incentive amount is deducted from the budgeted funds for that particular component. (The database automatically calculates the incentive amounts based on the approved Deemed Savings values.)

8. Cleco may, but is not obligated to, inspect a percentage of customer homes where measures have been installed. Cleco expects to inspect five (5) of the first ten (10) Projects completed by each Project Sponsor. The overall target Inspection rate is a minimum of 10% of Projects completed by each Project Sponsor. Cleco may conduct such Inspections using its own personnel and/or third-party contractors. Additionally, employees of the Project Sponsor or any other third-party doing assessment or installation work for the Program must complete an initial demonstration of proficiency in meeting the Best Practices before working in the Program.
9. Incentive payment is made based on the percentage of installations that pass Inspection.

**Enrollment**

All enrollment documents must be completed and submitted online. All information **MUST** be entered in the application. If necessary, use the designation NA for “not applicable”. **All information must be correct for serious consideration of the application.**

Cleco will not reimburse any Project Sponsor for any costs incurred by participating in the Program, including, without limitation, costs of preparing the Program Enrollment Materials, reviewing or executing the Program Master Agreement, any Residential Participant Agreement or any other agreement or document relating to the Program, or preparing and submitting implementation or performance reports.

**Enrollment Timeline**

Cleco will update its program web page for each component at the times shown in Table 8.

**Table 8: Program Timeline**

January 5, 2024	Register and begin completing applications
January 15, 2024	First day of Program
November 15, 2024	Last day of Program year

**Enrollment Review Procedure**

Cleco will review the Program Enrollment Materials on a first come, first served basis. Cleco may request clarification of, or additional information about, any item submitted as part of the Program Enrollment Materials. Project Sponsors will have seven (7) business days to respond to such requests. If the clarification or additional information provided is not sufficiently responsive, Cleco may, at its sole discretion, request additional information or discontinue its evaluation of the submittal. Previous program participation does not guarantee acceptance.

**Enrollment Confidentiality**

The Program (and all other Cleco energy efficiency programs) is subject to oversight by the Louisiana Public Service Commission (the "Commission"), which may request a copy of any program materials received by Cleco. Sensitive information identified as such and submitted by the Project Sponsor will be treated confidentially, but only to the extent reasonably practicable in light of the requirements and procedures of the Program and the

Commission. Cleco shall have no liability of any kind to any Project Sponsor or any other party as a result of disclosure of any information.

The Evaluation, Measurement, and Verification (EM&V) team may also request a copy of any program materials that Cleco receives.

### **Enrollment Evaluation**

To ensure a comprehensive program targeting all eligible customers and measures while achieving its demand and energy goals, Cleco will award contracts based upon the Project Sponsor's qualifications, targeted regions, and measures.

Cleco may reject a Project Sponsor's Program enrollment for any reason in its sole discretion, including, without limitation:

- The Project Sponsor fails to respond to any request for additional information.
- The Project Sponsor fails to meet program eligibility requirements.
- The Program Enrollment Materials are received after the program has been fully subscribed.
- The Project Sponsor is found to have made material misrepresentations in the Program Enrollment Materials
- The Project Sponsor fails to comply with applicable federal, state and local laws and regulations.
- The Program Enrollment Materials are found to be incomplete or insufficient.
- Failure to follow program Best Practices.
- The Project Sponsor has performed poorly in previous Cleco programs or any other utility programs.
- Cleco, in its sole judgment, determines that the Project Sponsor is incapable of fulfilling the terms and conditions of the Program Master Agreement.
- The Project Sponsor fails to submit the required insurance documentation.

### **Market Actor ID Badges**

- These badges are for ID purposes only; no magnetized badges are needed since they will not need access to Cleco facilities.
- Currently, 12-15 total badges are needed for 6 different Market Actor companies. Only the lead techs and/or contractor holding a BPI certification is eligible for a badge.
- Badges will have Market Actors business name, technician's name, and technician's picture shown on the badge.
- Badges are only to be worn during conducting business with Cleco customers.
- Badges will be ordered and issued once the enrollment process is completed and approved. They will be verified and renewed every 90 days by Residential Consultant Anthony Giacona.
- Badges will cover all Cleco Power territories where Participating Market Actors cover.
- Cleco will print the badges. Cleco Power Wise Residential Program Consultant will be in charge of getting the expired badges back from the Market Actors, as well as the Market Actors that leave or get terminated. Badges must be turned in within 30 days of termination/leave. If badges are not received within this time frame, the Market Actor will be suspended from the Power Wise Programs, and all payments rendered to them will be held until the badges are returned.

- Cleco Power Wise will be in charge and responsible for properly disposing badges.

“I \_\_\_\_\_ authorize and give permission to Cleco Power to use my company business, name, and a snapshot photo of employees for identification badges. I understand that these badges are only to be worn while conducting business with Cleco customers. I understand that these badges must be returned back to Cleco within 30 days of the employee leaving the company. I understand that it is my company’s responsibility to return these badges to Cleco and not doing so could result in termination from the Cleco Power Wise Program, as well as all payments being held by Cleco Power Wise until badges are turned in.”

## **5. Insurance Required of Contractors / Certificate of Insurance (COI)**

Evidence of general liability, automobile liability, workers compensation, and employers’ liability insurance are required. Failure to submit and/or maintain the required insurance will result in a lock-out of the Project Sponsor from the database and possible dismissal from Program participation. All Certificates of Insurance (COIs) shall comply with the requirements set forth in the Program Master Agreement and shall show the certificate holder as Cleco Corporate Holdings LLC.

All required documents must be submitted to [energyefficiency@cleco.com](mailto:energyefficiency@cleco.com). Cleco is not responsible for documents not submitted to the correct address. Insurance requirements of Market Actors for this program are subject to change at any time upon notification to Contractors/Market Actors:

1. All policies are to be written by insurance companies rated "A- V" or better in Best's Key Rating Guide unless, otherwise approved by Cleco.
2. “Cleco Corporate Holdings LLC, its Subsidiaries and Joint-Owners” are to be named (included) as an additional insured on all liability policies (except workers’ compensation and employer's liability policies).
3. Waiver of subrogation in favor of Cleco Corporate Holdings LLC, its Subsidiaries and Joint-Owners is to be included on all policies.
4. Cleco is to be provided 30 days’ written notice of policy cancellation.
5. Below are the minimum coverages required by Cleco:

*Note: These limits may be achieved through any combination of primary and/or excess liability policies. Excess coverage must be equal to or broader than underlying policies.*

- a. General Liability: \$1,000,000 each occurrence

Coverage shall include contractual liability; independent contractor's liability; premises and operations hazard; explosion, collapse and underground hazard; products and completed operations liability; broad form property damage liability; personal injury liability; and watercraft liability. If any of the above coverages are excluded from the general liability policy or sublimits apply to these coverages, they are to be noted on the certificate.

- b. Automobile Liability: \$ 1,000,000 each occurrence

- c. Workers' Compensation: \$500,000, unless limited by statute in the State of Louisiana
- d. Employer's Liability: \$ 500,000 each occurrence

### **Project Sponsor Approval**

Cleco will notify each Project Sponsor of its enrollment status within thirty (30) business days after the completion of the enrollment process. Within seven (7) business days after notification via email of Program enrollment approval, the Project Sponsor must provide Cleco with the following:

- A signed copy of the Program Master Agreement (Downloaded from P3 with Sponsor's information printed on the agreement)
- Any other documentation noted in the approval email.

It is the sole responsibility of the Project Sponsor to ensure that Cleco receives the required supplemental materials by close of business on the applicable due date. Faxed submittals are not acceptable. Once a Project Sponsor's application has been approved and the Program Master Agreement executed, the Program Administrator will open the database to allow the Project Sponsor access to the appropriate website.

**Enrollment to the Program does NOT automatically entitle an applicant to receive an agreement to participate as a Project Sponsor.**

## **6. Weatherization Program Implementation**

Work may be performed from the effective date of the Program Master Agreement (January 15th) through and including November 15th, 2024, or when Program funds are depleted. Upon receipt of the "approved" email notice from the database or receipt of the countersigned Program Master Agreement and approval of marketing materials, the Project Sponsor may begin marketing and installation activities. All Projects must be submitted within thirty (30) days of the work being completed as noted by the date on the fully executed RPA, and in all cases complete work and submit Projects for Incentive Payments on or before November 15, 2024.

### **Marketing**

Project Sponsors are encouraged to use the one-page brochure provided by Cleco and available on the program website. Project Sponsors may not at any time use the Cleco logo or name on any identification cards. **Any other marketing materials containing the Cleco name or logo must be approved by Cleco prior to their use and should be included in the application process.** Social media advertising and/or mass media advertising such as newspaper must be pre-approved along with the territory for the advertising.

Examples of potentially acceptable and non-acceptable phrases are in Appendix E (provided that Appendix E does not constitute the written approval of Cleco required by this paragraph). Cleco reserves the right to terminate

the Program Master Agreement of any Project Sponsor using marketing materials containing any unapproved language or reference to Cleco.

A listing of currently approved participating Project Sponsors is available at the Program website, [www.cleco.com/powerwise](http://www.cleco.com/powerwise). A prospective customer may use this site for Project Sponsor verification.

**Entering into a Program Master Agreement or any other agreement with Cleco as a Project Sponsor does not imply Cleco’s endorsement or approval of any company, product, or service.**

## **Prescriptive Requirements**

### **Infiltration Measures**

This measure must be completed, including the post-installation CFM reading, prior to starting the duct efficiency measure, if applicable. In addition to meeting the installation standard in the Program’s Best Practices, unless contraindicated for health and safety reasons, the following interior leakage points shall be treated as part of this measure, **if applicable**:

- Attic access when in the conditioned space.
- All plumbing penetrations.
- Weather-stripping and a door sweep or threshold with door bottom on all exterior doors.
- Missing or broken windowpanes and other building envelope penetrations.
- Furnace closet door: For homes with gas space heating, louvered doors or open ceilings to gas space heater closets may not be sealed off to reduce air infiltration unless an outside air source is installed according to BPI standards.

**Failure to complete the prescriptive requirements will result in a total measure failure, regardless of the CFM reading.**

**When applying infiltration and/or duct efficiency measures, the Project Sponsor should make every effort to address areas needing attention in that particular home.**

*Infiltration Example:* If window caulking is old, dried and ineffective, the Project Sponsor should include this in the work performed. It is not acceptable to simply pass by this need due to being overly busy or behind schedule. In an example like this, where other infiltration measures were applied, but the windows were not caulked, despite the need; the customer suffers because this home is now ineligible to participate in the Program for 10 years for any additional infiltration measures.

### **Prior to Installation**

- Subcontractors must be approved by Cleco prior to beginning installations.
- A carbon monoxide (CO) test is required for all air/duct infiltration installations with space-heating in

- conditioned space.
- Any gas fueled unvented space heaters must be disconnected along with the gas line capped off prior to installation of any duct/air infiltration measures.
- The RPA must be executed by Participant (customer), Project Sponsor and any subcontractor before work is started.
- Calendar entries must be entered before the day of the project

Additional information for multi-family sites:

- Require pre-approval of the premise and measures via the P3 database.
- Must submit a work schedule via P3 database at least seven (7) days prior to beginning installations at multi-family facilities with 20 units or more.
- Cleco will not consider payment for installations submitted without the proper pre-approvals.

## **Residential Participant Agreement**

The Residential Participant Agreement (RPA) is the primary agreement executed between a residential customer and the Project Sponsor prior to measure installation. The RPAs contain certain consumer protection provisions and disclosures.

All Project Sponsors are required to use the 2024 Cleco-provided RPA form. Prior to commencing any installation of measures, the RPA must be initially executed by the Project Sponsor, the Participant (customer) and if applicable, the subcontractor. Make sure that the Participant phone number is a working daytime number. A form of the document is available on the website and is located in Appendix D. Any form not located on Cleco's website will be provided to Project Sponsors when requested via e-mail. Installation and equipment standards are included in the program's Best Practices.

Once the Project is complete, the Project Sponsor will have the Participant sign the completion acknowledgment line on the RPA. The Project Sponsor upload a copy of the fully executed and acknowledged RPA to the Program's P3 database.

## **Field Notes Form**

All Project Sponsors are required to complete and submit the 2024 Cleco Field Notes Form. A form of the document is available on the website and is located in Appendix D. A Field Notes Form shall be completed for each customer and uploaded to the P3 database. NOTE: In addition, if direct install measures were performed, the quantity must be recorded in the field notes.

## **Photos**

Besides the Participant Agreement (fully executed and acknowledged) and Field Notes Form required by program guidelines for each installation, Cleco Power Wise requires pre-and post-photos for some measure installations. **All required photos MUST contain a geotag displaying the location, time, and date that the photo was taken to be considered for payment.**



- Air Infiltration Measure:
  - 2-3 “pre” and 2-3 “post” photos capturing the scope of retrofit are required.
  - “pre” and “post” photo of manometer readings with the top portion of the field notes form visible.
- Ceiling Insulation Measure: For homes with a reported baseline R-value that is less than R-5:
  - 2-3 “pre” and “post” photos capturing the scope of retrofit
  - A close-up picture of a ruler that shows the measurement of the depth of the pre insulation.
  - Photo of the insulation certificate affixed near the attic opening.
- Duct Sealing Measure:
  - 2-3 “pre” and 2-3 “post” photos capturing the scope of retrofit are required
  - “pre” and “post” photo of manometer readings with the top portion of the field notes form visible.
  - Photos must include both supply air handler as well as the return area of the HVAC system in single family detached homes.
- LED Bulbs Measure:
  - All incandescent bulbs are removed must be in a geotagged & timestamped photograph clearly showing the number of incandescent bulbs removed.
  - All required photos MUST contain a **geotag** displaying the location, time, and date taken to be considered for payment.

## Post-Installation

- Participant (customer) must sign the acknowledgment line on the RPA upon completion of the Project to verify the measures were installed as stated. The RPA provides Cleco with permission to inspect the installation, which may be required before incentive payments are approved. The completed (fully executed and acknowledged) RPA must be provided to the Participant (customer) and the Project Sponsor must upload a copy thereof (clear scan or picture is acceptable) to the Program P3 database.
- If a subcontractor was used, Project Sponsor must provide the customer with an All Bills Paid Affidavit. A copy of the document is available on the website and is located in Appendix D.

## Residential Weatherization Assessment Report

The Residential Weatherization Assessment Report (RWAR) notifies the customer of what measures were performed on their home and why they are valuable. The technician must check off the appropriate boxes in each measure category and fill out any corresponding blanks. Once reviewed with the customer, the customer must sign in acknowledgement that they received a copy and that they understand what work was done and why other work was not done on their home. The completed (fully executed and acknowledged) RWAR must be provided to the Participant (customer) and the Project Sponsor must upload a copy thereof (clear scan or picture is acceptable) to the Program P3 database. This is required for all projects where an assessment was done inclusive of projects where the customer did not qualify for any measures. Any projects that were not completed due to customers canceling or not showing up for their appointment, and therefore not having a chance to sign the report, do not have to upload this form but must note the project in P3 as to any efforts that were made and the reason why the assessment could not be completed.

## Customer Service Invoice

Market Actor must provide the customer an invoice accounting for all measures installed within 5 business days of the project reaching *Approved* status in P3. The invoice must contain the market actor company name, contact information, and breakdown of services performed and cost of each. There must be a line after the subtotal for “Cleco Incentive Applied” then the total at the bottom. If the incentive does not fully cover the project amount, the market actor must include a short explanation for the additional charges of measures performed.

## 7. Weatherization Reporting and Project Submission

All Projects and incentive reporting will be done via the P3 database. **The Project Sponsor will upload RPA, any other agreements with the customer and field notes forms into the database.**

### Reporting

When an installation is reported, the database will deduct the incentive from the total balance of funds for the program.

The following information is required for each Project completed:

- Customer type (Mobile Home, Residential or Multi-Family)
- Customer name and address
- Customer email address
- Cleco meter number
- Daytime telephone number
- Parish
- Type of heating
- List of installed measures

### Project Submission

Due to the nature of the first-come first-served program design, Project Sponsors are encouraged to submit Projects as early and as often as possible. Before submitting Projects, ensure that all required documents, photographs and other materials are uploaded for each Project. Project Sponsors have two options for submitting Projects:

#### ***One-by-One Submission***

1. Access your Project List and select the Project you wish to submit.
  - a. Note that only Projects that are in the “Work Completion Pending” status can be submitted.
2. Within the Project Details page, select the “Submit” from the dropdown menu (in the top right panel under the Project status).
3. Select the “Submit” button in blue to submit Project.
4. Project will be submitted if it meets all of the program requirements.

#### ***Batch Submission***

1. Access your Project List and select the checkboxes in the far-left column for each Project that you wish to submit. Note: that only Projects that are in the “Work Completion Pending” status can be submitted.
2. Select the “Batch Action” dropdown menu.
3. Select “Submit” from the dropdown menu. A confirmation message will appear.
4. Click “Go” within the confirmation window.
5. Projects will be submitted if they meet all of the program requirements.

Cleco will review and process the submitted Projects. Once the reviewed Projects are approved and ready for Incentive Payment, Cleco will batch up the approved Projects and process payments twice monthly. See chart below in “Payment of Invoice” section for project submission deadlines, inspection/documentation complete dates, and corresponding invoicing dates.

## 8. Weatherization Project Payments

### Installation Inspections

All Measures installed under the Program must conform to or exceed the standards listed in the Arkansas TRM Deemed Savings Tables. Cleco will take a sample of customer sites and make field Inspections to determine if each Measure has been installed properly and is capable of performing its intended function. If Measures installed do not meet the Inspection standards, they will not be eligible for incentives.

If Cleco is unable to contact the customer to make an Inspection, the Project Sponsor may need to make the Inspection arrangements. If Cleco is unable to inspect Measures installed at the customer’s location, those Measures may be counted as failures.

### Incentive Payment Adjustments

After field Inspections are completed, all installations will be evaluated on a measure-by-measure basis to calculate an adjustment factor for the Incentive Payment. This adjustment factor will be the ratio of the incentive total for all measures that pass Inspection to the total incentive for all Measures tagged for Inspection. **The adjustment factor will then be applied to all sites on the Invoice.**

The algorithm for calculating the adjustment factor is described below:

$$\text{Adjustment Factor} = \frac{\text{Incentive total for measures that pass inspection}}{\text{Incentive total for all measures tagged for inspection.}}$$

In instances where all Measures pass Inspection, the adjustment factor is 1.00. This assumes all figures on the Invoice are correct. If only 75% of the inspection sample passes Inspection, the adjustment factor will be 0.75; only 75% of the incentives will be paid.

If the Project Sponsor disagrees with the payment adjustment, the Project Sponsor may request that all information be reviewed again after the Project Sponsor provides additional clarifying information. If the Project Sponsor and Cleco cannot agree on the adjustments after the review, the Project Sponsor and Cleco must use the dispute resolution mechanisms that are specified in the Program Master Agreement.

The customer may contact Cleco representatives at any time with any issues concerning the Program design or Project Sponsors working in the Program.

**Accurate Reporting**

Accurate reporting is of key importance in calculating savings achieved. Cleco may prohibit a Project Sponsor from submitting certain Measures if problems occur repeatedly in accurate reporting of required information such as square footage and air conditioner size. **All installations will be entered and submitted within thirty (30) days after the installation date.** Failure to adhere to the reporting requirements may be used for termination of the Program Master Agreement.

**Excessive Failures**

CLECO reserves the right to limit the Measures a Project Sponsor is allowed to install or to terminate Program Master Agreements due to excessive failures.

**Payment of Invoice**

Project invoicing will be processed after documentation is reviewed for accuracy, inspections are completed, and the incentives have been adjusted. Any projects that require corrections may be subject to the next invoice date. The 2024 invoice schedule is listed in Table 9.

Cleco will review and process the submitted in the order received. Once the reviewed Projects are approved and ready for Incentive Payment, Cleco will batch approved projects into invoices by program on the invoice dates listed below. The invoices are submitted to Cleco Accounts Payable (AP) to process and issue payments to market actors profile set up with the AP department. See chart below in “Payment of Invoice” section for project submission deadlines, inspection/documentation complete dates, and corresponding invoicing dates. Cleco will process approved invoices twice monthly. If there are updates that need to be made with Cleco AP, please contact [energyefficiency@cleco.com](mailto:energyefficiency@cleco.com) to seek further assistance.

<b>Table 9: 2024 Invoice Schedule</b>	
<b>PROJECT SUBMISSION DEADLINE*</b>	<b>INVOICE DATE</b>
Sunday, January 28, 2024	Friday, February 9, 2024
Sunday, February 11, 2024	Friday, February 23, 2024
Sunday, February 25, 2024	Friday, March 8, 2024
Sunday, March 10, 2024	Friday, March 22, 2024

Sunday, March 24, 2024	Friday, April 5, 2024
Sunday, April 7, 2024	Friday, April 19, 2024
Sunday, April 21, 2024	Friday, May 3, 2024
Sunday, May 5, 2024	Friday, May 17, 2024
Sunday, May 19, 2024	Friday, May 31, 2024
Sunday, June 2, 2024	Friday, June 14, 2024
Sunday, June 16, 2024	Friday, June 28, 2024
Sunday, June 30, 2024	Friday, July 12, 2024
Sunday, July 14, 2024	Friday, July 26, 2024
Sunday, July 28, 2024	Friday, August 9, 2024
Sunday, August 11, 2024	Friday, August 23, 2024
Sunday, August 25, 2024	Friday, September 6, 2024
Sunday, September 8, 2024	Friday, September 20, 2024
Sunday, September 22, 2024	Friday, October 4, 2024
Sunday, October 6, 2024	Friday, October 18, 2024
Sunday, October 20, 2024	Friday, November 1, 2024
Sunday, November 3, 2024	Friday, November 15, 2024
Sunday, November 17, 2024	Monday, December 2, 2024
<i>Monday, December 2, 2024</i>	<i>Friday, December 13, 2024</i>
<i>Sunday, December 15, 2024</i>	<i>Monday, December 23, 2024</i>
<i>*Projects must be fully and accurately submitted by <b><u>PROJECT SUBMISSION DEADLINE</u></b> to be included on the corresponding invoice date. Any projects that are submitted by the deadline and are sent back for revisions are not grandfathered in with the original submission date.</i>	

**CLECO’S PAYMENT OF INCENTIVE PAYMENT(S) TO PROJECT SPONSOR IS EXPRESSLY AND SPECIFICALLY CONDITIONED UPON (I) CLECO’S RECEIPT OF ALL REQUIRED NOTICES, SUBMITTALS AND MATERIALS FROM PROJECT SPONSOR WITHIN THE APPLICABLE PERIODS SPECIFIED IN THIS PROGRAM MANUAL, THE PROGRAM MASTER AGREEMENT AND ALL OTHER PROGRAM DOCUMENTS, (II) PROJECT SPONSOR’S COMPLIANCE WITH ALL TERMS AND PROCEDURES APPLICABLE TO THE PROJECT SPONSOR UNDER THIS PROGRAM MANUAL, THE PROGRAM MASTER AGREEMENT AND ALL OTHER PROGRAM DOCUMENTS (III) THE PROJECT SPONSOR BUDGET CAP AND (IV) AVAILABILITY OF FUNDS UNDER THE PROGRAM FOR PURPOSES OF INCENTIVE PAYMENTS. FAILURE BY PROJECT SPONSOR TO DELIVER ANY OF SUCH NOTICES, SUBMITTALS OR MATERIALS WITHIN SUCH PERIODS OR TO COMPLY WITH SUCH TERMS AND PROCEDURES SHALL BE DEEMED A MATERIAL BREACH OF THE THIS PROGRAM MANUAL, THE PROGRAM MASTER AGREEMENT AND ALL OTHER PROGRAM DOCUMENTS.**

## **9. Weatherization Summary of Procedures & Frequently Asked Questions**

### **Summary of Procedures**

#### **Application and Approval Process**

1. Fully read this Program Manual and all documents referenced herein.
2. Complete Enrollment through link found at <https://cleco.p3.enertrek.com>.
3. Submit the following within 24 hours of application, if applicable:
4. Upload to the program's P3 database a picture of the date and model number of last recalibration (Duct Efficiency or Infiltration measures only)
5. Cleco will notify applicants of the application's status within thirty (30) business days.
6. Submit all items requested in the contract approval email within seven (7) business days.
7. Once all required items have been received and approved, Cleco will execute the Program Master Agreement.

#### **Prior to Installation**

1. Complete work schedule in P3 database and keep it updated.
2. Subcontractors must be approved by Cleco prior to beginning installations. Cleco must be notified in writing if a new subcontractor was included during or after the Project Sponsor enrollment process. Cleco must approve the subcontractor in writing before work begins.
3. All marketing materials must be approved by Cleco including social media and multi-media such as newspaper advertising.
4. Customer must sign the Residential Participant Agreement (RPA) before work begins.
5. Prior to installations at multi-family sites:
  - Submit Projects, via P3 database, for pre-approval of the site and the measures.
  - Submit a work schedule, via P3 database, at least seven (7) days prior to beginning installations.

#### **After Installation**

1. Complete the Field Notes Form
2. Customer must sign the RPA acknowledgement line indicating measures were installed.
3. Project Sponsor must provide customer with fully executed and acknowledged RPA.
4. Customer must sign the RWAR acknowledgement line indicating they understand the measures performed.
5. Project Sponsor must provide customer with fully executed and acknowledged RWAR.
6. Project Sponsor must provide customer with customer service invoice for measures performed.
7. If using subcontractors, provide the customer with All Bills Paid Affidavit

#### **Reporting**

1. Report installations on-line within the appropriate time frame
  - Submit Projects within thirty (30) days of the work being completed as noted by the date on the fully

executed RPA, and in all cases complete work and submit Projects for Incentive Payments on or before November 15, 2024.

- Cleco will review and process the submitted Projects. Once the reviewed Projects are approved and ready for Incentive Payment, Cleco will process approved invoices twice monthly.
2. Upload the following to the database:
    - Field notes form for each customer with air infiltration or duct efficiency work including pre and post CFM numbers.
    - Cleco copy of the fully executed and acknowledged RPA for each customer included in the Incentive Report
    - Fully executed and acknowledged Residential Weatherization Assessment Report
    - Photos as required by Best Practices and this Program Manual.
    - Customer service invoice for measures performed.

### **Payment**

1. A sample of sites will be inspected.
2. Payment will be issued based on the percentage of measures that pass inspection.
3. All Incentive Payments are further subject to the limitations set forth in this Program Manual, the Program Master Agreement and all other Program documents.

### **Weatherization Frequently Asked Questions**

1. *What if the measures I actually install are slightly different from what was described in the original application?*

A Project Sponsor may only install the measures approved in the application.

2. *Do I have to give the incentive to the customer?*

No. The Project Sponsor may use the incentive in any manner they see fit. In the Residential Participant Agreement that the customer and the Project Sponsor are required to sign, the customer acknowledges that the Project Sponsor is receiving incentives through Cleco's energy efficiency program.

3. *What happens if I do not report the measure installation data within thirty (30) days?*

The program manager has the authority to cancel/delete any Project entered into P3 and not submitted within thirty (30) days after such entry.

4. *What happens if I am approved as a Project Sponsor, but do not perform any Projects during the program year?*

Poor performance in this area may be used by Cleco to limit a Project Sponsor's future participation.

5. *What happens if there were funds available when I checked, but when I completed the Project no program funds remain?*

It is the responsibility of the Project Sponsor to monitor the overall program budget and their Project Sponsor limit to determine there are ample funds before implementing installations.

## 10. Residential HVAC Program

### Residential HVAC Program Overview

Residential HVAC Program: Offers incentives to participating Market Actors (Trade Allies) for the installation of high energy efficiency HVAC equipment in residences served by Cleco Power Wise™.

**Income-Qualified (IQ) HVAC Program:** Offers incentives to participating Market Actors for the installation of high energy efficiency HVAC equipment in low-income residences served by Cleco Power Wise™. Incentives are higher in the IQ HVAC Program to enable Market Actors to provide energy efficiency measures at a lower cost to the customer. Low-income customers are eligible through one of these webtools:

- [LMISD Web Tool](#)



1. Click link for [LMISD Web Tool](#)

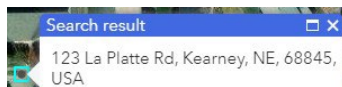
2. Enter premise address & press enter

3. Click the Layer Icon

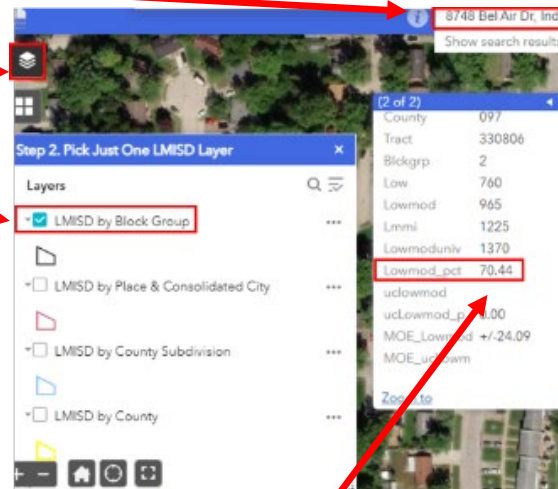
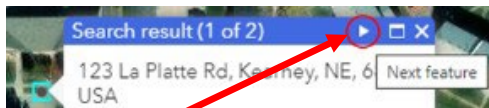
4. Uncheck all layers except “LMISD by Block Group”

5. Click on center of blue square enabling LMISD features ► (see below).

a) Before clicking inside blue square



b) After clicking inside blue square



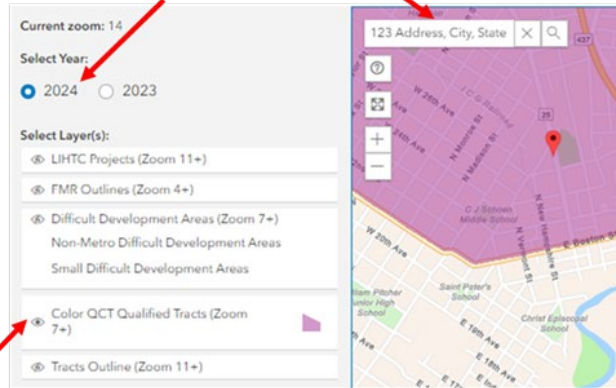
6. Click ► then scroll down to find Lowmod\_pct field

7. If Lowmod\_pct is greater than or equal to 51.00, then the premise is eligible for Income Qualified program

8. Include a screenshot of the result showing premise address, LMISD layer & Lowmod\_pct in P3

- [HUD QCT Tool](#)

- a. Go to: [HUD QCT Tool](#)
- b. Enter premise address & press enter
- c. Select current year: 2024



- d. Select Layer: Color QCT Qualified Tracts
- e. Include screenshot showing premise located within purple shaded.

Cleco Power Wise™ contracts with Market Actors for the installation of qualifying energy efficiency measures that result in a reduction of peak demand (kw) and energy savings (kWh).

Incentive payments will be based solely on the savings yielded through the installation of qualifying energy efficiency measures. Market Actors use the incentive payment to offset the cost of a measure to end-use customer. Incentive payments will be issued directly to the Market Actor.

Enrollment Steps for Market Actors:

1. Review applicable Program Manuals and Program Agreements on the [program website](#).
2. Register and enroll to participate in our program tracking database, [P3](#).
3. Provide the following on the Residential HVAC Program Enrollment Application:
  - Marketing materials pertaining to this program\*
  - Copies of up-to-date licenses\*\*
  - W-9
  - Certificate of insurance provided by your insurance agent. Please review Section 5: Insurance Required of Contractors / Certificate of Insurance (COI) for insurance requirements.
4. Cleco Power Wise™ will fully review each enrollment application and notify Market Actors on the status of their application.

\*Marketing materials must be approved by Cleco Power Wise™ prior to use.

\*\*Current licenses required for all HVAC installers.

### **Customer Eligibility Information:**

Residential customers of Cleco Power Wise™ are eligible to have qualifying equipment installed in their homes as part of the Program. Eligible customers shall be identified by their nine-digit Cleco meter number located on the meter attached to the premise or in the **Billing Detail** section at the top of their most recent billing statement matching residential customer's service address.

### **Eligible residential properties include:**

1. Single-Family properties – Residential dwellings consisting of two or less units (i.e., a duplex or less)
2. Mobile Home properties – Manufactured homes

### **Equipment Eligibility and Reporting Requirements**

The following types of residential equipment qualify for incentives when installed in existing homes served by Cleco Power Wise™.

1. AC systems\*: **Minimum 15.2 SEER2 / 11.5 EER2, up to 5.4 tons**
2. Heat Pump systems\*: **Minimum 14.3 SEER2 / 10.8 EER2 / 7.5 HSPF2, up to 5.4 tons**

All systems must be AHRI-matched, as evidenced by the appropriate AHRI rating sheet, to be submitted by the Market Actor. All installations and supporting documentation must be submitted by participating Market Actor within 60 days of installation. If going from an Air Conditioner with a Gas Furnace to a Heat Pump, customer must install a dual fuel Heat Pump, with gas as the back up fuel source, to qualify.

*\*A new AC or Heat Pump system includes an entire packaged unit, or a split system consisting of an indoor unit with a matching remote condensing unit. Mini-Split air conditioners and heat pumps are now stand alone measures and should be reported as such in P3. Incentives will match those of central air conditioner and heat pump measures.*

### **Required Forms and Documents (found in the P3 database):**

1. **Residential Participant Agreement:** this Cleco Power Wise™ provided form is the primary agreement executed between the Customer and the Market Actor prior to measure installation. The RPAs contain customer protection provisions and disclosures.
2. **All Bills Paid Affidavit (subcontractors only):** this form is provided to Customers by Market Actor after the completion of measure installations. It provides Customers protection against claims of subcontractors. (Provided to customer only when a subcontractor is used)

### **Decision/Action Types for HVAC Installations**

#### **The Replace-on-Burnout (ROB):**

ROB defines a situation where an older, inoperable unit was replaced after failure or the equipment is older than the estimated useful life (EUL). For this scenario, the measure baseline condition would be based on a codes/standards or “standard practice”, rather than the efficiency of the equipment that was previously installed.

Additional reporting requirements for an ROB scenario include:

- Photograph of new inside nameplate
- Photograph outside nameplate

**Early Retirement (ER):**

An early retirement scenario occurs when existing, functional, or actively used equipment is replaced with similar, higher efficiency equipment. Sizing of new unit must be less than or equal to that of the existing unit.

Additional reporting requirements for an ER scenario include:

- Age of replaced unit
- Retired unit model number, serial number and manufacturer
- Photograph of retired unit nameplate
- Photograph of new inside nameplate and outside nameplate
- Photo of gauges showing that the system is currently working and customer affirms the condition of the replaced unit(s) and their motivation for unit replacement. The customer response for an ER decision can be found on the Residential Participant Agreement.

**Rightsizing:**

Systems that are right sized per a heat load calculation are eligible. Additional reporting requirements for rightsizing include:

- Photograph of retired OUTSIDE unit nameplate
- Photograph of installed INSIDE unit nameplate
- Photograph of installed OUTSIDE unit nameplate
- If photograph of retired unit nameplate is unavailable or not legible, provide estimated square footage of conditioned area served by the retired unit

**Incentives**

<b>Central Heat Pump Incentives</b>				
<b>SEER2</b>	<b>Residential Heat Pump</b>	<b>Residential HP Replacing Electric Resistance Furnace (No upsizing)</b>	<b>IQ Heat Pump</b>	<b>IQ HP Replacing Electric Resistance Furnace (No upsizing)</b>
14.3-15.2	\$350/ton	\$3,000/system	\$450/ton	\$3,500/system
15.3-16.1	\$400/ton		\$500/ton	
16.2-17.1	\$500/ton		\$600/ton	

17.2+	\$600/ton		\$700/ton	
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<b>Central Air Conditioner (AC) Incentives</b>		
<b>SEER2</b>	<b>Residential AC</b>	<b>IQ AC</b>
15.2-16.1	\$150/ton	\$450/ton
16.2-17.0	\$200/ton	\$500/ton
17.1+	\$250/ton	\$600/ton

**Calculation example:**

All reporting will be based on rated cooling capacity instead of nominal tonnage. Capacity ranges will use normal rounding convention (midpoint rounds up, anything below rounds down) and round to the nearest half-ton according as seen in the table below.

Example: An installed 16 SEER2 heat pump with a rated cooling capacity of 25,000 Btuh would fall under the “2-ton” range and qualify for an \$800 (\$400 x 2-ton) incentive.

<b>Cooling Capacity Btu/hour (Btuh)</b>		<b>Tonnage</b>
0	14,999	1
15,000	20,999	1.5
21,000	26,999	2
27,000	32,999	2.5
33,000	38,999	3
39,000	44,999	3.5
45,000	53,999	4
54,000	65,000	5

**Customer Service Invoice**

Market Actor must provide the customer an invoice accounting for all measures installed within 5 business days of the project reaching *Approved* status in P3. The invoice must contain the market actor company name, contact information, and itemization of services performed and cost of each. There must be a line after the subtotal for “Cleco Incentive Applied” then the total at the bottom. If the incentive does not fully cover the project amount, the market actor must include a short explanation for the additional charges of measures performed. A copy of the customer service invoice must be uploaded into P3.

CLECO RESERVES THE RIGHT TO UPDATE, MODIFY OR AMEND THIS PROGRAM MANUAL AND ANY OTHER PROGRAM DOCUMENTS, MATERIALS OR PROCEDURES FROM TIME TO TIME, FOR ANY REASON, IN CLECO'S SOLE DISCRETION

## **11. Approved Market Actor Conduct and Expectations; Other Terms and Conditions**

### **Customer Service Expectations**

- Project Sponsors are required to respond to phone calls and emails from Cleco customers within 72 hours.
- Project Sponsors are required to provide the customer with an invoice accounting for all measures installed within 5 business days of the project reaching *Approved* status in P3.
- Project Sponsors are required to respond to all Cleco Employee emails within 72 hours.
- Project Sponsors are required to notify the Program team immediately of any customer complaints.
- A Program consultant or Project Sponsor will ask the customer to complete a satisfaction survey via a web-based product after each quality control Inspection or after the project is completed and will encourage customers to share any feedback that would help Cleco improve the Program.
- Feedback collected from customer satisfaction surveys will be analyzed by the Program team and pertinent findings will be reviewed with Project Sponsors individually. If negative feedback is received, the Project Sponsor will be contacted immediately so that service recovery can take place and steps can be taken to prevent future negative occurrences.
- All Project Sponsors are required to bring their own tools needed for assessments and work conducted within the premise.
- All Project Sponsors are required to provide a professional experience for the customer. This includes conducting good housekeeping practices during and after all work. This includes using drop clothes, wearing shoe covers, etc. This also includes refraining from the use of profanity or vulgarity on the customer premise. Project Sponsors must remember that they are representing Cleco.
- All Project Sponsors must perform work in a professional manner that reflects the intent and requirements of the Program. Repeated Inspection failures or other material violations of Program requirements may, in Cleco's sole discretion, result in termination of the Project Sponsor from the Program.
- Project Sponsors, upon request from Cleco, and at no additional cost to the customer, shall make reasonable repairs or corrections to work that Project Sponsor or its subcontractor has performed to bring such work up to the Program's Best Practice Installation Standards. The repairs or corrections must be completed within the time frame specified by Cleco. Project Sponsors must also take steps to ensure that future work will comply with such Best Practices and other requirements of the Program.

### **Quality Assurance and Disciplinary Action**

#### **Violation of Program Requirements**

Cleco, in its sole discretion, may take disciplinary action in response to violations of Program requirements, including immediate removal from the Program. Such violations include, but are not limited to, the following:

- Any funding provided to Project Sponsors or customers (including incentives and rebates) is used to pay for or reimburse an item or activity not authorized under the Program.
- Any fraudulent use of the Program, including submitting falsified rebate, incentive or other Program forms, or submitting requests for rebates or incentives for equipment or work previously paid for or funded by another Energy Efficiency program.
- Any misrepresentation of the Program by a Project Sponsor in communications or in advertisements directed to a customer or potential customer. Failure to comply with the advertising guidelines stated herein will result in the Project Sponsor's termination from the Program or suspension from the Program until the non-compliant advertising is ceased.
- Failure to perform in accordance with Program agreements, contracts, guidelines, policies, procedures and technical specifications may result in suspension or revocation of the Project Sponsor's ability to participate in the Program.
- Continued customer complaints and/or continued low scores from customer satisfaction survey results.

### **Probation and Termination**

In addition to the violations enumerated above, Project Sponsors who fail on-site inspections, have discrepancies between rebate or incentive forms and invoices, have other issues calling into question the integrity of data or violate any material Program requirements may, in Cleco's sole discretion, be placed on probation.

When on probation, the Project Sponsor may be required to coordinate a larger percentage of quality control Inspections and provide additional data for each Project, depending on the specific energy conservation measure. The duration and specific nature of the probationary period will be determined on a case-by-case basis in Cleco's sole discretion.

Cleco, in its sole discretion, reserves the right to suspend or terminate any Project Sponsor for any material violation of Program requirements, including, without limitation, the following infractions:

- Violation of this Program Manual, the Program Master Agreement, the Participant Agreement or the Best Practice Installation Standards.
- Failure to obtain and maintain minimum insurance requirements.
- Failure to complete required training.
- Non-compliance of specialized equipment.
- Non-compliance with regulatory requirements.
- Failure to comply with Cleco's advertising guidelines and requirements.
- Verbal or physical abuse of a Cleco employee, homeowner or customer.
- Failure to schedule work through the P3 database.

### **Customer Complaints**

Customers with comments or complaints may contact Cleco directly via phone or email. This includes customer complaints that relate to a Project Sponsor, subcontractor, third party consultant or inspector or other service

provider (each of the foregoing, including the Project Sponsor and subcontractors, a "Service Provider"). Cleco offers the dispute resolution process outlined below solely for purposes of convenience and customer service. CLECO IS UNDER NO OBLIGATION TO RESOLVE ANY DISPUTE ARISING BETWEEN OR AMONG CUSTOMERS AND SERVICE PROVIDERS.

Cleco Residential Solutions Program  
Contact: Jaci Sewell – Program Manager  
Phone: 1-833-373-6842  
Email: jaci.sewell@cleco.com

## **Dispute Resolution Process**

1. Review the customer's concern.
2. Speak to all parties to get the facts of the situation.
3. Attempt to mediate a solution that satisfies all parties to the extent possible.
4. Communicate and document how the dispute was resolved (or not resolved) by a phone call to the Program manager's supervisor and in the Program's monthly report.

If the result of the process shows an issue(s) with a Service Provider, the Program Manager will document the issue(s) in writing to such Service Provider, along with a plan for corrective action and a warning that further incidents will not be tolerated. If the behavior does not improve over a specified time, the Program Manager may remove such Service Provider from the Program.

Each Service Provider will also be held accountable for customer complaints regarding its employees or subcontractors.

## **Other Terms and Conditions**

**NO REVIEW, INSPECTION, CONSIDERATION, STATEMENT OR ACCEPTANCE BY CLECO OF OR REGARDING ANY PROJECT, PROJECT SITE, REQUEST FOR AN INCENTIVE PAYMENT OR REBATE OR THE DESIGN, CONSTRUCTION, INSTALLATION, OPERATION OR MAINTAINING OF MEASURES SHALL BE CONSTRUED OR RELIED UPON AS A REPRESENTATION OR WARRANTY BY CLECO REGARDING ANY MATTER WHATSOEVER, INCLUDING, WITHOUT LIMITATION, THE ECONOMIC OR TECHNICAL FEASIBILITY, CAPABILITY, COMPATIBILITY, SAFETY OR RELIABILITY OF ANY PROJECT, PROJECT SITE, MEASURES OR INSTALLATION THEREOF. BY PARTICIPATING IN THE PROGRAM, EACH PROJECT SPONSOR, SUBCONTRACTOR AND PARTICIPANT ACKNOWLEDGES THAT CLECO HAS NOT HERETOFORE MADE NOR HEREBY MAKES ANY SUCH REPRESENTATIONS OR WARRANTIES, WHETHER EXPRESS OR IMPLIED.**

**ALL PROJECTS INSTALLED AND/OR SERVICES PERFORMED UNDER THE PROGRAM MUST BE UNDERTAKEN BY A PROJECT SPONSOR OR SUBCONTRACTOR PARTICIPATING IN THE**



**PROGRAM. THE SELECTION OF A PARTICIPATING PROJECT SPONSOR OR SUBCONTRACTOR TO PERFORM THE WORK IS THE SOLE DECISION OF THE PARTICIPANT. CLECO DOES NOT ENDORSE, NOR MAKE ANY REPRESENTATIONS OR WARRANTIES, WHETHER EXPRESS OR IMPLIED, IN CONNECTION WITH ANY PRODUCT, INDIVIDUAL, COMPANY OR WORK PERFORMED UNDER THE PROGRAM. CLECO MAKES NO GUARANTEE NOR ANY OTHER REPRESENTATION OR WARRANTY, EXPRESS OR IMPLIED, AS TO THE QUALITY, COST OR EFFECTIVENESS OF THE PRODUCTS PROVIDED OR WORK PERFORMED BY ANY PARTICIPATING COMPANY OR BY ITS EMPLOYEES, SUBCONTRACTORS OR SUPPLIERS.**

#### **INDEMNIFICATION**

**EACH PARTICIPANT, PROJECT SPONSOR, CONTRACTOR, SUBCONTRACTOR, SUPPLIER AND OTHER PERSON OR COMPANY PERFORMING, SUPPLYING, INSTALLING, SOLICITING, PURCHASING OR RECEIVING WORK, SERVICES, GOODS, EQUIPMENT OR OTHER MATERIALS IN CONNECTION WITH THE PROGRAM (EACH HEREINAFTER REFERRED TO AS A "PROGRAM PARTY") AGREES TO DEFEND, PROTECT, INDEMNIFY AND HOLD HARMLESS CLECO AND ANY INDIVIDUAL, CORPORATION, PARTNERSHIP, LIMITED LIABILITY COMPANY, ASSOCIATION, TRUST OR OTHER BUSINESS ORGANIZATION OF ANY KIND DIRECTLY OR INDIRECTLY CONTROLLING, CONTROLLED BY OR UNDER COMMON CONTROL WITH CLECO (HEREINAFTER REFERRED TO AS "AFFILIATES") AND THE RESPECTIVE SHAREHOLDERS, MEMBERS, PARTNERS, OFFICERS, DIRECTORS, MANAGERS, TRUSTEES, INCORPORATORS, AGENTS, ATTORNEYS, CONSULTANTS, SERVANTS, EMPLOYEES AND OTHER REPRESENTATIVES (HEREINAFTER REFERRED TO AS "REPRESENTATIVES") OF CLECO AND ITS AFFILIATES FROM AND AGAINST ANY AND ALL CLAIMS, LOSSES, EXPENSES, ATTORNEYS' FEES, EXPENSES OF LITIGATION, COSTS OF COURT AND/OR ALTERNATIVE DISPUTE RESOLUTION, EXPERT WITNESS FEES, DAMAGES, DEMANDS, JUDGMENTS, CAUSES OF ACTION, SUITS AND ANY AND ALL LIABILITY IN TORT, CONTRACT OR ANY OTHER BASIS AND OF EVERY KIND WHATSOEVER (HEREINAFTER REFERRED TO AS "CLAIMS") ARISING OUT OF, RELATING TO OR IN ANY WAY CONNECTED WITH THE PROGRAM, ANY PROJECT, ANY PROJECT SITE, ANY MEASURES OR THE INSTALLATION, MAINTENANCE OR PERFORMANCE THEREOF, ANY PROGRAM RELATED AGREEMENT OR CONTRACT, ANY OTHER PROGRAM DOCUMENT OR THE ACTS OR OMISSIONS OF ANY PROGRAM PARTY OR ITS REPRESENTATIVES OR OF CLECO (INCLUDING ITS AFFILIATES) OR ITS REPRESENTATIVES, INCLUDING, WITHOUT LIMITATION: (I) INJURY TO, OR DEATH OF, PERSONS, (II) DAMAGE TO PROPERTY OR NATURAL RESOURCES, (III) VIOLATION OF ANY LOCAL, STATE OR FEDERAL LAW OR REGULATION, INCLUDING, WITHOUT LIMITATION, ENVIRONMENTAL, HEALTH AND SAFETY LAWS AND REGULATIONS, (IV) STRICT LIABILITY IMPOSED BY ANY LAW OR REGULATION, (V) EQUIPMENT MALFUNCTIONS AND (VI) ENERGY SAVINGS SHORTFALLS. EACH PROGRAM PARTY WAIVES AS TO CLECO (INCLUDING ITS AFFILIATES) AND ITS REPRESENTATIVES, WITH RESPECT TO ANY CLAIMS BROUGHT AGAINST CLECO**

**(INCLUDING ITS AFFILIATES) OR ITS REPRESENTATIVES, ANY DEFENSE SUCH PROGRAM PARTY MAY HAVE BY VIRTUE OF THE WORKER'S COMPENSATION LAWS OF ANY STATE, TO THE EXTENT ALLOWED BY LAW.**

**THE FOREGOING INDEMNITY OBLIGATIONS SPECIFICALLY INCLUDE ANY CLAIM ARISING OR ALLEGED TO ARISE FROM NEGLIGENCE, GROSS NEGLIGENCE OR STRICT LIABILITY OF CLECO (INCLUDING ITS AFFILIATES) OR ITS REPRESENTATIVES, REGARDLESS OF WHETHER SUCH NEGLIGENCE, GROSS NEGLIGENCE OR STRICT LIABILITY IS A JOINT AND CONCURRING CAUSE OF SUCH CLAIM; PROVIDED, HOWEVER, THAT THE FOREGOING INDEMNITY OBLIGATIONS SHALL NOT APPLY TO A CLAIM TO THE EXTENT THAT SUCH CLAIM IS CAUSED SOLELY BY THE GROSS NEGLIGENCE OF CLECO IN THE CONDUCT OF CLECO'S ON-SITE INSPECTION OF A PROJECT SITE FOR PROGRAM PURPOSES.**

## APPENDIX A

### GLOSSARY

#### - B -

**Baseline:** For purposes of determining estimated and measured energy savings for equipment replacement Projects implemented under the Program, the baseline is generally defined as the energy consumed by equipment with efficiency levels that meet the applicable current federal standards and reflect current market conditions. In certain limited circumstances, the baseline may be determined by the equipment or conditions currently in place. This is likely to occur only when federal energy efficiency standards do not apply, or when the Existing Equipment can be shown by the Project Sponsor to have a remaining service life of at least ten years. For determining estimated and measured savings for building shell improvements, the baseline is generally determined by the building's current condition, e.g., existing insulation 'r' values, air infiltration rates, etc.

**Best Practice Installation Standards:** A document Cleco's energy efficiency program uses to stipulate installation standards and other procedures required for Project Sponsors to meet and follow as a condition to receiving Incentive Payments in respect of installed Measures. Such document is also referred to herein as "Best Practices," and copy is available through the Program's website ([www.cleco.com/energy-efficiency-programs](http://www.cleco.com/energy-efficiency-programs)) and in the "Help" section of the Program Portfolio Portal. Cleco reserves the right to update, amend or modify the Best Practices from time to time in Cleco's sole discretion, subject to any notice requirements therein.

#### - C -

**Commission:** The Louisiana Public Service Commission.

#### - D -

**Deemed Savings:** A pre-determined, validated estimate of Energy Savings and Peak Demand Savings, attributable to a Measure in a particular type of application, that a utility may use instead of Energy Savings and Peak Demand Savings determined through measurement and verification activities.

#### - E -

**Energy Efficiency Service Provider:** A person who installs Measures or performs other energy efficiency services.

**Energy Savings:** A quantifiable reduction in a customer's consumption of energy, or the amount by which energy consumption is reduced as a result of the installation of qualifying Measures. Energy savings are determined by comparing the efficiency of the installed Measures to that of an appropriate Baseline.

**Evaluation, Measurement and Verification (EM&V):** A catch-all phrase used in the energy industry to refer to a systematic review of the delivery and impacts of energy efficiency programs.

**Existing Equipment:** The equipment that is installed at the customer's site prior to the customer's participation in the Program.

- I -

**Incentive Payment:** A payment made to a Project Sponsor based on the level of approved Peak Demand Savings, Energy Savings and/or Deemed Savings (each expressed as kW or kWh, as applicable). Incentive rates are based on Commission approved avoided costs and incentive caps.

**Inspection:** Onsite examination of a Project to verify that a Measure has been installed and is capable of performing its intended function.

- M -

**Measure(s):** New equipment, material or systems that, when installed and used at a Project Site, result in a measurable and verifiable reduction in either purchased electric energy consumption measured in kilowatt-hours (kWh), or Peak Demand measured in kilowatts (kW), or both. Measures shall improve the electrical efficiency of existing and ongoing electricity-consuming end-uses which meet the requirements of the Program, this Program Manual and of all agreements between a Project Sponsor and Cleco. Measures do not include equipment, material or systems that are installed as a part of new construction.

- P -

**Participant:** A qualified residential customer of Cleco that owns or leases facilities at one or more Project Sites and that has entered into a Residential Participant Agreement with Project Sponsor for the installation of Measures as a part of Project.

**Peak Demand:** The electrical demand at the time of the highest annual demand on the utility's system, measured in 15-minute intervals.

**Peak Demand Savings:** The reduction in demand on the utility's system at the times of the utility's summer peak period, during the months of June, July, August, and September. Peak Demand Savings will be determined by comparing the efficiency of the installed Measures to that of an appropriate Baseline.

**Program:** Cleco's Residential Solutions Program, Program Year 10, as more particularly described in this Program Manual.

**Program Enrollment Materials:** The forms, documents, and other materials (hard copy, electronic or otherwise) submitted by a Project Sponsor (or prospective project sponsor) in connection with its enrollment in or application to the Program.

**Program Manual:** The foregoing document (entitled "CLECO – 2024 Cleco Residential Solutions – 2024 LA Quick Start Phase I – Program Year 10 (PY10)"), together with all addenda, exhibits, forms and other attachments hereto, all as may be updated, amended or modified from time to time in Cleco's sole discretion, subject to any notice requirements therein.

**Program Master Agreement:** A contract entered into by the Project Sponsor and Cleco following the approval of the Project Sponsor's Program Enrollment Materials. The Program Master Agreement, along with this Program Manual and any other agreements between Project Sponsor and Cleco, governs Project Sponsor's participation in the Program and sets forth certain rights and obligations relating thereto.

**Program Portfolio Portal (P3):** Software application utilized in the Program to report and track Project savings, and incentives. "Program Portfolio Portal" is sometimes abbreviated herein as "P3."

**Project:** One or more Measures installed at a Project Site under a Program Master Agreement in accordance with the Program, as further described in the Program Manual. A single Project may include Measures installed at multiple Project Sites.

**Project Site:** The location of a Participant's facilities at which approved Measures will be installed pursuant to a Residential Participant Agreement.

**Project Sponsor:** Any organization, group, or individual under contract with Cleco to provide Energy Savings and/or Peak Demand Savings within the parameters of the Program, this Program Manual, a Program Master Agreement, and any other governing documents.

**Prudent Electrical Practices:** Those practices, methods, standards, and equipment commonly used in prudent electrical engineering and operations to operate electrical equipment lawfully and with safety, dependability, and efficiency and in accordance with the National Electrical Safety Code, the National Electrical Code, and any other applicable federal, state and local codes. In the event of a conflict, the applicable federal, state, or local code shall govern.

- R -

**Residential Participant Agreement:** A Residential Participant Agreement, a form of which shall be provided by Cleco, between a Participant and a Project Sponsor that specifies, among other things, the rights and obligations of each party thereto with respect to the installation of certain Measures. Residential Participant Agreement is abbreviated herein as "RPA."

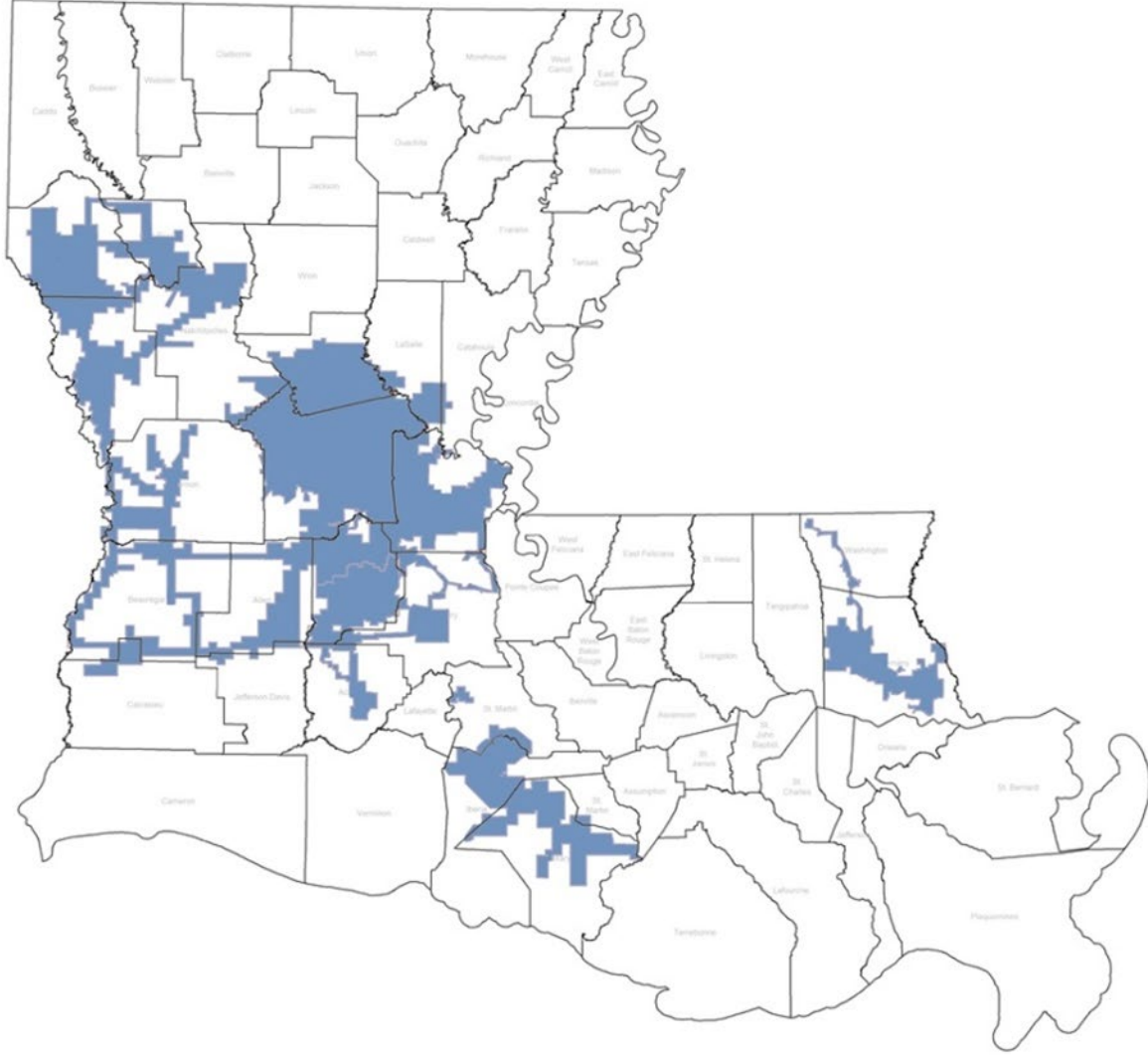
**Residential Weatherization Assessment Report:** A Residential Weatherization Assessment Report, a form of which shall be provided by Cleco, between a Participant and a Project Sponsor that explains the measures

completed in the participants home as well as reasoning if some measures did not qualify. Residential Weatherization Assessment Report is abbreviated herein as “RWAR”

- T -

**Technical Reference Manual (TRM):** A resource document that includes information used in program planning and reporting of energy efficiency programs. It can include savings values for measures, engineering algorithms to calculate savings, impact factors to be applied to calculated savings (e.g., net-to-gross values), protocols source documentation, specified assumptions, and other relevant material to support the calculation of measure and program savings. The term "Technical Reference Manual" is sometimes abbreviated herein as "TRM."

**APPENDIX B**  
**Cleco Service Area Map**  
**(Parishes)**



## Appendix C

### Towns Served

This list is not all inclusive but does represent many of the towns Cleco serves. Please request a Cleco bill verify participant is a Cleco customer.

Abita Springs	Cypremort	Hineston	Patterson
Alexandria	Point	Jeanerette	Pearl River
Amelia	DeQuincy	Keatchie	Pelican
Baldwin	DeRidder	Kinder	Pine Prairie
Ball	Deville	Kolin	Pineville
Basile	Dry Prong	Lacombe	Plaucheville
Bayou Latanier	Dupont	Lecompte	Pleasant Hill
Bayou Vista	Echo	Leesville	Pollock
Beaux Bridge	Edgefield	Loreauville	Ragley
Benson	Effie	Madisonville	Rayne
Berwick	Elizabeth	Mamou	Reddell
Bordelonville	Elmer	Mandeville	Rosepine
Boyce	Elton	Mansfield	Simmesport
Bunkie	Esler	Mansura	Slidell
Campti	Eunice	Many	South
Centerpoint	Evergreen	Marksville	Mansfield
Centerville	Florien	McNary	South Sabine
Chambers	Forest Hill	Merryville	St. Landry
Charenton	Franklin	Mora	St. Martinsville
Chataignier	Franklinton	Moreauville	Turkey Creek
Cheneyville	Garden City	Morgan City	Vick
Colfax	Glenmora	New Iberia	Ville Platte
Converse	Gloster	New Llano	Washington
Cottonport	Grand Cane	Noble	Woodworth
Coushatta	Greenwood	Oakdale	Zwolle
Covington	Gueydan	Oberlin	
Creola	Hamburg	Opelousas	
Crowley	Hessmer	Oxford	



**APPENDIX D  
FORMS**

**All Bills Paid Affidavit**

**AFFIDAVIT OF PAYMENT OF CONTRACTORS,  
LABORERS AND MATERIALMEN**

Date: \_\_\_\_\_  
Affiant: \_\_\_\_\_  
Customer: \_\_\_\_\_  
Property: \_\_\_\_\_  
\_\_\_\_\_

Affiant on oath swears that the following statements are true:

1. Affiant is the seller and the installer (Project Sponsor) of the high efficiency materials and equipment as described on the accompanying Residential Participant Agreement.
2. Affiant has paid each of Affiant's contractors, laborers, and materialmen in full for all labor and materials provided to Affiant for the purchase and installation of the high efficiency measures. Affiant is not indebted to any person, firm, or corporation by reason of any such construction, procurement or related work.
3. Affiant hereby warrants that no mechanics or materialmen's liens will be placed on Customer's property relating to the installation of high efficiency measures.

\_\_\_\_\_  
Affiant Signature

\_\_\_\_\_  
Affiant Name and Position

Acknowledgement  
STATE OF LOUISIANA §  
PARISH OF \_\_\_\_\_§

This instrument was acknowledged before me on the \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by Affiant.

\_\_\_\_\_  
Notary Public, State of Louisiana



Residential Participant Agreement
Cleco Residential Solutions Program

Form with fields for Customer, Project Sponsor, and Subcontractor (if applicable), including Street Address, City, State, Zip, and Daytime phone #.

Check One: [ ] Residential Solutions [ ] Residential Income-Qualified Cleco Meter Number: \_\_\_\_\_

The parties hereto agree as follows:

- 1. Project Sponsor agrees to sell and install and Customer agrees to purchase the energy efficiency measures described in the Bill of Sale dated (the "Bill of Sale") that will produce energy savings and/or peak demand savings that qualify through the Cleco Residential Solutions Program...
2. Project Sponsor warrants that it will install all energy efficiency measures in a good and workmanlike manner consistent with the program's Best Practice Installation Standards...
3. Customer has received a list of equipment to be installed (quantity, model #s and efficiency ratings), as set forth in the Bill of Sale.
4. Project Sponsor will maintain, or will ensure subcontractor maintains, all insurance required to be carried under the Program Master Agreement.
5. Customer has received a written and oral disclosure of the financial agreement between Project Sponsor and Customer, including an explanation of the total Customer payments, any applicable interest charges, all possible non-payment penalties and whether such agreement may be sold, transferred or assigned. Additionally, Customer has received a written disclosure of all warranties, work activities and terms and conditions.
6. If a subcontractor is used, subcontractor must sign where indicated below and, after completion of the installation of the measures, Project Sponsor shall provide Customer an "All Bills Paid" affidavit ensuring that no lien will be placed on Customer's property relating to the installation of measures pursuant to this Residential Participant Agreement (this "Agreement").
7. Each of the undersigned acknowledges that (i) the Program Manual includes a complaint procedure through which Customer may report performance issues by Project Sponsor or subcontractor and (ii) Cleco, however, is under no obligation to resolve disputes between or among the undersigned.
8. Customer acknowledges that (i) Project Sponsor may receive an incentive for the energy and peak demand savings derived from Customer's energy efficiency improvements and that such incentive shall be paid for through a customer-funded program, and (ii) but for the Program and the incentives provided thereunder, the project would not have been completed or would have been completed with less efficient measures.
9. Customer acknowledges and agrees that no review, inspection, consideration, statement or acceptance by Cleco of or regarding Project Sponsor, subcontractor, the Project, the Project Site or the energy efficiency measures shall be construed or relied upon as a representation or warranty by Cleco, whether express or implied, regarding any matter whatsoever, including, without limitation, the economic or technical feasibility, capability, compatibility, safety or reliability of the Project, Project Site or the energy efficiency measures or the qualifications of Project Sponsor or subcontractor. Customer further acknowledges and agrees that (i) Cleco has not made nor hereby makes any such representations or warranties and (ii) Customer is solely responsible for the selection of Project Sponsor and subcontractor.
10. Each of the undersigned acknowledges that Project Sponsor is an independent contractor and is not part of, nor endorsed by Cleco or the Louisiana Public Service Commission (the "Commission"), and that Project Sponsor is not authorized to make representations or incur obligations on behalf of Cleco or the Commission. Each of the undersigned further acknowledges that neither Cleco nor the Commission is a party to this Agreement and that the undersigned are solely responsible for performance hereunder.
11. Customer acknowledges they are a residential customer of Cleco.
12. Customer agrees, upon three (3) days' prior oral or written notice, to provide Cleco and the independent measurement and verification (EM&V) contractor with full and complete access to Customer's property for any purpose related to this project. The right of access will be subject to Customer's reasonable access requirements and, unless otherwise agreed, must occur within normal business hours.
13. Customer agrees to provide, and agrees that Project Sponsor or Cleco may provide (if applicable), the EM&V contractor and Cleco with Customer's utility bills, project documentation, contractor invoices, technical and cost information related to the project and consumption data. Customer further acknowledges and agrees that Project Sponsor may measure and report the project's energy and demand savings to Cleco and the EM&V contractor.
14. No energy efficiency service provider, manufacturer, or other business involved in providing Customer's energy efficiency measures may ask or require Customer to give up its rights under consumer protection statutes, waive performance warranties or make false claims of energy savings or reductions in energy costs.
15. If Customer is not the owner of the property on which the measures will be installed, Customer represents and warrants that (i) its execution and delivery of this Agreement does not violate any agreement between Customer and such property owner and (ii) it has notified such property owner of the measures to be installed pursuant to this Agreement and has received such property owner's written authorization to install such measures. Project Sponsor acknowledges that it has received a copy of such written authorization.
16. All provisions of the Program Manual that apply to Customer, Project Sponsor or subcontractor are hereby incorporated herein and made part hereof, and each party hereto agrees to be bound by and comply with such provisions that are applicable to such party.
17. WITHOUT LIMITING PARAGRAPH 16 ABOVE, EACH OF THE UNDERSIGNED ACKNOWLEDGES AND AGREES TO BE BOUND BY THE APPLICABLE INDEMNIFICATION PROVISIONS CONTAINED IN EACH OF THE PROGRAM MANUAL AND THE PROGRAM MASTER AGREEMENT.

[ ] Customer affirms that the HVAC systems(s) selected for replacement through Cleco's Power Wise Program was/were functional at the time of the assessment and the Program aided in the replacement decision. Additionally, for Heat Pump installations, Customer acknowledges they were advised against using the emergency heat setting on Heat Pump thermostats.

Each of the parties hereto has caused this Agreement to be duly executed as of the Effective Date.

Project Sponsor: \_\_\_\_\_ (Signature) \_\_\_\_\_ (Date) Subcontractor: \_\_\_\_\_ (Signature) \_\_\_\_\_ (Date) (if applicable)

◆ I have executed and been given a copy of this Agreement: \_\_\_\_\_ (Customer Name Print) \_\_\_\_\_ (Customer Signature) \_\_\_\_\_ (Date)

ACKNOWLEDGEMENT UPON COMPLETION OF INSTALLATION OF MEASURES:

◆ Measures described in this Agreement and the Bill of Sale have been installed to my satisfaction: \_\_\_\_\_ (Customer Signature) \_\_\_\_\_ (Date)



**Cleco Power Wise  
Field Data Collection Form**

Date: \_\_\_\_\_ Project #: \_\_\_\_\_  
 Project Sponsor/Market Actor: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Customer Name: \_\_\_\_\_ Email Address: \_\_\_\_\_  
 Service address: \_\_\_\_\_ Apt #: \_\_\_\_\_  
 City: \_\_\_\_\_ Zip: \_\_\_\_\_ Parish: \_\_\_\_\_  
 Home Phone: \_\_\_\_\_ Cell/Work Phone: \_\_\_\_\_  
 Check One:         Residential Solutions         Residential Income Qualified

Building Type:     Single family detached     Duplex     Multi-family (5 or more units)  
                           Mobile home                             Apartment:     Upper     Lower     Middle  
 Foundation Type:  Slab             Crawl Space/Basement  
 Number of stories: \_\_\_\_\_ Sq. Ft. of Conditioned Space: \_\_\_\_\_  
 Number of bedrooms: \_\_\_\_\_ Number of occupants: \_\_\_\_\_  
 Heating type:     Gas                             Electric Resistance             Heat Pump  
 Cooling type:     AC                             None  
 Water Heating Type:  Gas WH     Electric WH     Heat pump WH  
 Gas appliances:     Yes                            No

**Attic Insulation**    *Project Sponsor affirms that an insulation installation certificate was permanently affixed near the attic opening*  
 Insulation Type :     None             Loose-fill fiberglass             Loose-fill cellulose  
                                   Loose-fill mineral fiber                             Fiberglass/rock wool batt  
 Square feet of ceiling to be insulated : \_\_\_\_\_ Number of bags installed: \_\_\_\_\_  
 Insulation Condition :     Good     Fair     Poor  
 Existing Base R-value of insulation: \_\_\_\_\_ Pre install insulation depth ("): \_\_\_\_\_  
 Post Install Final R-value: \_\_\_\_\_ Post install insulation depth ("): \_\_\_\_\_  
 By checking this box, Project Sponsor affirms that an insulation installation certificate was permanently affixed near the attic opening.

**LEDs**    (Maximum allowed = 30)                            Location(s) of installed LEDs:  
 Total # of A19 LEDs installed: \_\_\_\_\_  
 Wattage of replaced lamp: \_\_\_\_\_  
 **Flood BR30 LEDs** (Maximum allowed = 30)  
 Total # of BR30 LEDs installed: \_\_\_\_\_  
 Wattage of replaced lamp: \_\_\_\_\_

<input type="checkbox"/> Kitchen _____	<input type="checkbox"/> Bedroom #2 _____
<input type="checkbox"/> Bath #1 _____	<input type="checkbox"/> Bedroom #3 _____
<input type="checkbox"/> Bath #2 _____	<input type="checkbox"/> Dining Rm _____
<input type="checkbox"/> Bath #3 _____	<input type="checkbox"/> Laundry Rm _____
<input type="checkbox"/> Living Rm _____	<input type="checkbox"/> Office _____
<input type="checkbox"/> Bedroom #1 _____	<input type="checkbox"/> Other _____

**TOTAL LED/FLOOD BULB COUNT MUST NOT EXCEED 30**

**Air Infiltration** *\*project sponsor is required to document pre blower door reading if performed*

Wind shielding level:  Well-shielded  Normal  Exposed

Pre-retrofit CFM<sub>50</sub>: \_\_\_\_\_ Post-retrofit CFM<sub>50</sub>: \_\_\_\_\_

- If Gas Appliances, Enter Carbon Monoxide (CO) Test after Measure Installed (ppm)
- If Hazardous/Pre-existing condition exists, fill out on Hazardous/Pre-existime form

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**Faucet Aerators** (existing aerators must be at least 2.5 gallons per minute to qualify)

Number of Aerators:  Bath \_\_\_\_\_ Flow Rate \_\_\_\_\_  
 Kitchen \_\_\_\_\_ Flow Rate \_\_\_\_\_

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**Shower Heads** (existing shower heads must be at least 2.5 gallons per minute to qualify)

Number of shower heads: \_\_\_\_\_

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**Duct Sealing**

	<u>Cooling Btuh:</u>	<u>Heating Btuh:</u>	<u>SEER/HSPF:</u>	<u>Pre:</u>	<u>Post:</u>
<input type="checkbox"/> HVAC 1:	_____	_____	_____	_____	_____
<input type="checkbox"/> HVAC 2:	_____	_____	_____	_____	_____
<input type="checkbox"/> HVAC 3:	_____	_____	_____	_____	_____
<input type="checkbox"/> HVAC 4:	_____	_____	_____	_____	_____



## What did my weatherization include?

Approved Cleco Contractor

### Duct Sealing

In houses with forced-air heating and cooling systems, ducts are used to distribute conditioned air throughout the house. In a typical house, about 20 to 30 percent of the air moving through the duct system is lost due to leaks, holes, and poorly connected ducts.

- Your home was eligible for duct sealing. The technicians have sealed the ducts in your attic reducing air loss from \_\_\_\_\_ to \_\_\_\_\_ (Unit 1); \_\_\_\_\_ to \_\_\_\_\_ (Unit 2); \_\_\_\_\_ to \_\_\_\_\_ (Unit 3).
- Your home did not qualify for duct sealing because *(reason required)* \_\_\_\_\_

### Air Sealing

Air sealing is the process of discovering—and then sealing—all the nooks, crannies, gaps, and open seams throughout your home. Air sealing can also improve your home's overall air quality, reduce humidity in your house, increase the health and comfort of your home, and cut back on the amount of energy consumed by your heating and cooling equipment.

- Your home was eligible for air sealing. The technicians have air-sealed your home reducing air loss from \_\_\_\_\_ to \_\_\_\_\_.
- Your home did not qualify for air sealing because *(reason required)* \_\_\_\_\_

### Attic Insulation

One of the best ways to improve energy efficiency is to make sure your attic is sufficiently insulated. This can save up to 20 percent on your heating and cooling costs, according to the U.S. Department of Energy.

- Your home is eligible for incentives from Cleco that will cover part of the cost of installing blow-in insulation, and you are interested in receiving a quote on the remainder of the cost to install.
- Your home is eligible for incentives from Cleco that will cover part of the cost of installing blow in insulation but you are not interested in receiving a quote for the remainder of the cost to install.
- Your home is ineligible for incentives from Cleco due to *(reason required)* \_\_\_\_\_

### Other

- Your home qualified for \_\_\_\_\_ LED bulbs which use approximately 80% less electricity to generate the same amount of light.
- Your home qualified for \_\_\_\_\_ energy saving faucet aerators and \_\_\_\_\_ shower heads.

*I acknowledge a copy of this document was left for my records, and that I understand what work was completed on my home.  
I acknowledge I may be asked to participate in an audit from ADM to verify what work was completed at my home.:*

\_\_\_\_\_  
*(Customer Signature required)*

\_\_\_\_\_  
*(Date required)*

\_\_\_\_\_  
*(Address required)*





## Cleco Power Wise Residential Income Qualified Self-Certification Form of Income Eligibility

This statement is made to verify my household income. The Louisiana Public Service Commission has authorized energy efficiency programs to reduce Louisiana customers' utility bills. Contractors participating in the Income Qualified program receive higher incentive payments on households of income qualified customers. The purpose of the higher incentive payment is to enable the contractors to provide the improvements at low cost or no cost to the customer.

Customer Name \_\_\_\_\_ Email \_\_\_\_\_  
 Address \_\_\_\_\_  
 City: \_\_\_\_\_ Zip: \_\_\_\_\_ Parish: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Contractor: \_\_\_\_\_

I receive benefits from one or more of the programs listed in Category 1. (check each box that applies)

**Category 1**

*If you checked one or more boxes in Category 1, sign and date the form.*

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Food Stamps   | <input type="checkbox"/> Medical Assistance                  | <input type="checkbox"/> Temporary Assistance           |
| <input type="checkbox"/> Supplemental Security Income                                    | <input type="checkbox"/> Children's Health Insurance Program | <input type="checkbox"/> Qualified Medicaid Beneficiary |
| <input type="checkbox"/> Public Housing, Section 8 or other Housing Authority Assistance |  |   |

**Category 2**

*If Category 1 does not apply, complete Category 2.*

- My total household income before taxes is at or below the amount shown in the table below as determined by completing the Income Calculation Worksheet below. (Do not check this box before completing worksheet)

*Enter Income Amount per week/month/year (circle one)*

Wages from full or part-time employment as shown on paystub or W-2 form.	\$	
Unemployment or Worker's Compensation	\$	
Social Security	\$	
Retirement Income	\$	
Child Support and/or Alimony	\$	
All other earnings.	\$	
Total Annual Household Income	\$	

*Total the amounts directly above and compare the total to the allowable limits below.*

**Household Size (# of people) and Maximum Household Income**

	1	2	3	4	5	6	7	8
<b>Annual Household Income</b>	\$27,180	\$36,620	\$46,060	\$55,500	\$64,940	\$74,380	\$83,820	\$93,260
<b>Monthly Household Income</b>	\$2,265	\$3,052	\$3,838	\$4,625	\$5,412	\$6,198	\$6,985	\$7,772
<b>Weekly Household Income</b>	\$523	\$704	\$886	\$1,068	\$1,249	\$1,431	\$1,612	\$1,794

*By signing below, I certify that all information contained on this form is correct, and that I would like to participate in the Cleco Power Wise Income Qualified Program.*

Customer Name (print)	Customer Signature	Date
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**Louisiana Multi-Family Property Owner Certification Form of Tenant Income Eligibility**

This form is to verify that at least 75 percent of the units: (1) are rented by income eligible customers, and (2) have a separate electric meter. Contractors participating in the LPSC approved programs receive higher incentive payments when at least 75 percent of the tenants qualify as income eligible. The purpose of the higher payment is to enable the contractor to provide the improvements to 100 percent of the units at a cost that will provide the benefit of lower electric bills to tenants with a very low or no increase in rent. One form must be filled out for each qualifying multi-family apartment complex.

Name of Applicant (Property Owner or Agent)		
Address		Suite Number
City	State	Zip Code
Phone Number (Include Area Code)		Fax Number (Include Area Code)
Name of multi-family apartment complex		Number of units in complex
Name of Management Company		Name of on-site Property Manager
Street Address		
City	State	Zip Code
Phone Number (Include Area Code)		Fax Number (Include Area Code)

The multi-family apartment complex qualifies in one of the following categories. Check the appropriate category box.

**Category 1**

The multifamily apartment complex participates in one or more of the programs listed below (check each box that applies):

<input type="checkbox"/> Public Housing Authority	<input type="checkbox"/> Housing Trust Fund
<input type="checkbox"/> Multi-family Bond Program, with less than 25% units at market rate	<input type="checkbox"/> Low-Income Housing Tax Credit Program, with less than 25% units at market rate
<input type="checkbox"/> Project based Section 8	<input type="checkbox"/> Affordable Housing Disposition Program
<input type="checkbox"/> HOME Rental Housing Development	<input type="checkbox"/> Rural Rental Section 515 (FMDIA)

If you checked one or more of the boxes in Category 1, please sign and date the form. You must attach documentation such as the land use restriction agreement, showing participation in the above checked programs.

**Category 2**

- At least 75 percent of the tenant household incomes before taxes are at or below 200% of the Federal Poverty Guidelines. (Do not complete the worksheet below if you checked any of the boxes in Category 1. Do not check this box before completing the worksheet). To accurately determine tenant household income you may use the tenant rental application showing the number of individuals residing in the unit and the household income dated from within the past 18 months. If the rental application does not show the required information or the information is over 18 months old, then the tenant(s) must fill out a Commission approved Self-Certification Form.

Household Size	1	2	3	4	5	6	7	8
Annual Household Income	\$27,180	\$36,620	\$46,060	\$55,500	\$64,940	\$74,380	\$83,820	\$93,260
Monthly Household Income	\$2,265	\$3,052	\$3,838	\$4,625	\$5,412	\$6,198	\$6,985	\$7,772
Weekly Household Income	\$523	\$704	\$886	\$1,068	\$1,249	\$1,431	\$1,612	\$1,794

Under penalty of perjury, I certify that the above declaration is true and correct. I understand that the information is subject to audit and investigation by the Louisiana Public Service Commission upon reasonable notification and during normal business hours.

Applicant signature (property owner or agent)	Date	Contractor signature	Date
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The information provided on this form will be used solely for the purpose of determining eligibility of the multi-family unit and will remain confidential.

**APPENDIX E**  
**MARKETING MATERIAL:**

**ACCEPTABLE AND UNACCEPTABLE**

Information has sometimes been relayed to customers that is incorrect or misleading, giving the customer a misrepresentation of the responsibility of Cleco. Below are examples of potentially acceptable marketing phrases and phrases that are not acceptable. THESE EXAMPLES ARE PROVIDED FOR ILLUSTRATIVE PURPOSES ONLY. ALL MARKETING MATERIALS, INCLUDING SOCIAL MEDIA STATEMENTS, MUST BE APPROVED BY CLECO PRIOR TO USE.

**POTENTIALLY ACCEPTABLE:**

- "The local electric utility company has started an energy conservation program for their customers..."
- "The electric delivery companies are purchasing the energy savings we have provided you."
- "The Louisiana Public Service Commission (LPSC) has developed programs to assist qualified electric customers with installing energy saving improvements to help reduce consumption of energy..."
- "Utility companies typically call about 10% of the customers we do work for to ensure we are following guidelines and proper upgrades have been done."
- "...your only obligation may be to allow the utility to inspect our work."
- "(Project Sponsor) is not part of, or endorsed by the LPSC or the local electric utility. We are an independent company that provides energy efficiency measures under the programs for electric utilities."
- "These funds are provided by Cleco's energy efficiency program and are regulated by the Louisiana Public Service Commission."
- "The Louisiana Public Service Commission has approved programs to encourage energy service providers to offer energy conservation services to electric customers of investor-owned utilities."

**NOT ACCEPTABLE:**

**These phrases, or anything similar, are NOT to be used:**

- "All costs are paid by your electric company."
- "Would you like your utility company to pay for energy efficiency upgrades to your home at no cost to you?" "It is free because we are paid by the utilities"
- "We are getting paid but not from you, but by your utility company."
- "(Project Sponsor) bills your electric utility for the work performed on your home."