



OKLAHOMA GAS and ELECTRIC COMPANY

2025 Arkansas Energy Efficiency Program Portfolio Annual Report

**Section 9: Annual Reporting Requirements, and Order No. 29 in Docket No. 06-004-R.
Version 3.0 May 20, 2014**

May 1, 2026

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1.0 Executive Summary

Oklahoma Gas and Electric Company (“OG&E” or “Company”) hereby submits its Energy Efficiency (“EE”) program portfolio Annual Report for Program Year (“PY”) 2025 to the Arkansas Public Service Commission (“APSC” or “Commission”) pursuant to Order No. 29 in Docket 06-004-R. This report is required to be filed annually by May 1, in accordance with Order No. 7 filed in Docket 13-002-U on May 20, 2014.

HISTORY:

OG&E began implementation of EE programs in Arkansas in December 2007 with its Quick Start program portfolio. The Quick Start Portfolio continued through December 31, 2009. That portfolio contained seven programs in total: five OG&E-administered programs and two state-administered programs. The OG&E-administered programs included the LivingWise[®] Student Energy Education program, the Residential Energy Audit program, the Commercial Lighting program, the Motor Replacement program, and the Compact Fluorescent Light (“CFL”) program. The two state-administered programs included were the Arkansas Weatherization Program (“AWP”), and the Energy Efficiency Arkansas (“EEA”) program. The CFL program was not launched with the other Quick Start programs and was ultimately discontinued. The Quick Start portfolio allowed OG&E to build a program delivery framework for its customers in the Arkansas jurisdiction.

The initial Comprehensive Energy Efficiency Program was approved on February 3, 2010 for an 18-month implementation period ending on June 30, 2011. The initial Portfolio included the continuation of the two statewide programs, AWP, and EEA, and three OG&E programs:

LivingWise[®] Student Energy Education, Commercial Lighting, and Motor Replacement programs. The Residential Energy Audit program was renamed the Custom Energy Report (“CER”) program, and the new OG&E Weatherization program was introduced. The OG&E Weatherization program was established to offer weatherization for residential customers who would not otherwise qualify for the AWP.

The Comprehensive Portfolio was approved on June 30, 2011 for the remainder of PY 2011. PYs 2012 and 2013 were subsequently approved on December 30, 2011. The two statewide programs, AWP, and EEA were continued along with OG&E’s Commercial Lighting program and the LivingWise[®] Student Energy Education program. The OG&E Weatherization program was modified to a collaborative program with Arkansas Oklahoma Gas Corporation (“AOG”) to take advantage of administrative efficiencies and cost sharing. The Motor Replacement Program was incorporated into the new Commercial and Industrial Standard Offer Program (“C&I SOP”). In addition, new programs were created for both residential and non-residential customers. For residential customers, the A/C Tune-up and duct repair program, the Window Unit A/C program, and the Multi-Family program were created to provide a more diverse residential portfolio of programs. After the plan was approved, it was determined the Multi-Family program could not be implemented as designed and was discontinued. For non-residential customers, in addition to

the C&I SOP, the Commercial Tune-up program was created to inspect and tune commercial HVAC systems.

In January 2013, the APSC opened Docket 13-002-U to resolve issues related to the development and implementation of the second three-year cycle of EE programs in Arkansas. In Order No. 2 of that same Docket, the APSC approved the request of the Parties Working Collaboratively (“PWC”) extending the filing date for the second three-year cycle of EE programs from June 1, 2013 to June 1, 2014. The Commission also directed that energy savings targets, budgets, and the incentive structure previously approved by the Commission shall also be used for PY 2014. The exception to this was if the Utilities sought Commission approval of proposed modifications to their EE portfolios.

OG&E reviewed its portfolio performance through 2013 and filed an application to modify its existing portfolio and enhance its ability to achieve Commission-approved targets for 2014. OG&E’s interim filing proposed to modify its portfolio by discontinuing three programs, adding one new program, increasing the budget for industrial programs, and aligning its rebate structure with Commission approved targets. The three programs that were discontinued were the Residential HVAC program, the Commercial and Industrial HVAC program, and the Window Unit AC program. The new program added was the Multi-Family Direct Install program. On March 17, 2014, the Commission approved OG&E’s modified portfolio.

In February 2014, the APSC issued Order No. 15, in Docket 13-002-U extending for a second year, the filing date for the second three-year cycle of programs to June 1, 2015. The extension allowed time to complete efforts to develop a collaborative weatherization program, core C&I programs, and complete a potential study. In addition, the Commission approved a target increase of 0.90 percent of 2013 kWh sales for PY 2015. To meet the increased target for 2015, OG&E filed an application to increase the budgets by 40 percent for 3 of its programs to enhance its ability to achieve the new target. On April 1, 2015, the APSC approved OG&E’s budget increases for PY 2015.

In August 2015, the APSC issued Order No. 67, in Docket 07-075-TF approving OG&E’s PY 2016 Portfolio of Programs. Modifications made from PY 2015 to PY 2016 include the discontinuation of the AWP program, additions to the measure mix, and resulting budget increase for the OG&E/AOG (Unified) Weatherization program.

On June 1, 2016, OG&E filed the next triennial 2017-2019 Portfolio Plan and was approved by the Commission on October 7, 2016 through Order No. 73 in docket 07-075-TF. The most significant change from the prior portfolio is the consolidation of programs into sector-specific umbrella programs offering multiple marketing channels to improve accessibility to incentive funds when one channel is performing in a more cost-effective manner than another. The Commercial Lighting and Standard Offer Programs were combined into one Commercial Energy Efficiency Program (“CEEP”) with multiple marketing channels such as Schools and Government, Large C&I, and Small Business Solutions. Multi-Family Direct Install and Schools Energy Education (LivingWise®) were both combined into a Home Energy Efficiency Program (“HEEP”) with additional channels such as Consumer Products, Residential Solutions, and HVAC Replacement and Tune-ups. The Consistent Weatherization Approach (“CWA”),

referred to as the OG&E/AOG (Unified) Weatherization Program (“UWP”) in Annual Reports previous to Order No. 22 of Docket No. 13-002-U, and the EEA Program remained unchanged as stand-alone programs.

On March 8, 2018, OG&E filed for the inclusion of the Continuous Energy Improvement (“CEI”) Pilot Program for 2018 and 2019 into the existing CEEP Program in the 2017-2019 Portfolio Plan and was approved on March 23, 2018 through Order No. 80, in Docket 07-075-TF.

On March 15, 2019, OG&E filed the next triennial 2020-2022 Portfolio Plan and was approved by the Commission on June 17, 2019 through Order No. 88 in docket 07-075-TF. To assist in addressing Act 1102 Low-Income and over age 65 customers, OG&E carved out five percent of the CWA Program funds and incorporated additional health and safety measures. A soft cap of \$3,800 per home was implemented. The HEEP Program placed more emphasis on in-home assessments with direct install measures to drive participation in HVAC tune-ups and replacements to offset the reduction in lighting kWh savings. It also targeted remaining cost-effective envelope measure opportunities as it begins to move away from lighting due to the anticipated EISA baseline changes. CEI and Retro-Commissioning (“RCx”) channels were added to the CEEP Program.

In October of 2021, the APSC issued Order No. 62, in Docket 13-002-U approving Program Year 2023 as a bridge year and adopted Program Years 2024-2026 as the next triennial period of EE programming. The Commission also directed that energy savings targets, budgets, and the incentive structure previously approved by the Commission for PY2022 shall also be used for PY2023. The Commission amended the current 10 percent budget flexibility provision for Program Years 2021, 2022, and 2023, allowing utilities the unilateral ability to shift up to 20 percent of any program budget, with the exception of Act 1102 pilots and programs, to another without notice, as well as reinstate the budget flexibility provision that allows utilities to increase their overall EE Portfolio budgets by up to 10 percent without formal notice, provided that the utilities reasonably anticipate that the overall Portfolio plans will remain cost effective with the 10 percent flexibility. A second EE Potential Study was also approved which will inform the 2027-2029 filing.

On August 1, 2023, OG&E filed the next triennial 2024-2026 Portfolio Plan and was approved by the Commission on November 9, 2023, through Order No. 107 in docket 07-075-TF. To continue addressing Act 1102 Low-Income and over age 65 customers, OG&E again carved out five percent of the CWA Program funds and emphasized the importance of health and safety measures. The HEEP and CWA Program goals were adjusted to ensure that as many Act 1102 customers are reached as possible. Under the HEEP Program, a Positive Energy New Home Construction channel was added. OG&E also expanded the CEEP program with the addition of commercial cooking and fleet strategic energy management programs that will offer multiple energy savings measures and targeted programs for a wider variety of commercial and industrial customers.

Table 1-1 below summarizes historical annual incremental EE savings achieved by OG&E’s previous efforts:

Table 1-1 Historical Annual Incremental EE Savings Achieved

Program Year	Energy (kWh)	% Increase from Prior Year	Demand (kW)	% Increase from Prior Year
2008	2,434,738		666	
2009	5,607,951	130%	921	38%
2010	4,143,096	-26%	1,317	43%
2011	4,985,328	20%	1,520	15%
2012	7,595,741	52%	1,840	21%
2013	13,410,729	77%	2,797	52%
2014	13,794,070	3%	2,883	3%
2015	20,543,040	49%	3,115	8%
2016	23,257,181	13%	3,434	10%
2017	21,130,663	-9%	3,396	-1%
2018	22,556,832	7%	3,974	17%
2019	26,071,158	16%	4,591	16%
2020	28,050,242	8%	4,878	6%
2021	28,540,540	2%	5,479	12%
2022	28,149,987	-1%	4,806	-12%
2023	30,700,870	9%	5,697	19%
2024	31,338,220	2%	5,446	-4%
2025	30,807,015	-2%	5,725	5%

GOALS AND OBJECTIVES:

Order No. 15 in Docket 08-137-U established default energy savings target as percentage of 2010 energy sales. In 2020, the energy savings target increased to 1.20 percent of 2018 energy sales, adjusted for self-direct customers per Order No. 43 in Docket 13-002-U. For the 2024-2026 Portfolio cycle, the energy savings targets were set at 1.20 percent of 2022 energy sales, established by Order No. 68 in Docket 13-002-U.

The annual energy savings targets as a percentage of baseline sales and the corresponding filed energy savings targets and goals are shown in Table 1-2 below.

Table 1-2 Annual Energy Savings Targets and Goals

Program Year	Baseline Sales Year	Percent of Sales	Energy Savings Targets (MWh)	Filed Energy Savings Goals (MWh)
2011	2010	0.25%	6,752	6,753

2012	2010	0.50%	11,364	11,364
2013	2010	0.75%	16,844	16,844
2014	2010	0.75%	16,288	16,288
2015	2013	0.90%	18,904	19,879
2016	2014	0.90%	18,623	19,328
2017	2015	0.90%	18,058	18,063
2018	2015	0.90%	18,058	18,063
2019	2015	1.00%	20,531	20,136
2020	2018	1.20%	25,909	24,675
2021	2018	1.20%	24,555	25,200
2022	2018	1.20%	24,499	25,301
2023	2018	1.20%	24,499	25,301
2024	2022	1.20%	23,041	26,960
2025	2022	1.20%	22,705	27,149

OG&E's filed energy savings goal for 2025 was 27,149,447 kWh. After adjusting for self-direct customers from the baseline year, the baseline target was 22,704,576 kWh. The 2025 EE portfolio actual achieved energy savings were 30,807,015 kWh.

MAJOR ACCOMPLISHMENTS:

OG&E continued its success in 2025 by exceeding both the targeted and filed energy savings goals, reaching 114% of the filed goal while spending 88% of the planned budget.

PROGRESS ACHIEVED:

The program portfolio has demonstrated continued success by consistently outperforming savings goals over the past eight years. The historical annual energy savings to goal achievements is illustrated in Table 1-3 below. Table 1-4 below depicts the growth in year over year kWh achieved savings and improved cost per kWh success.

Table 1-3 Historical Annual Energy Savings to Goal Achievement

Program Year	Energy Savings Goal (kWh)	Energy Savings Achieved (kWh)	% of Goal Achieved
2011	6,752,758	4,985,328	74%
2012	11,363,560	7,595,741	67%
2013	16,843,560	13,410,729	80%
2014	16,287,689	13,794,070	85%
2015	19,879,081	20,543,040	103%
2016	19,328,413	23,257,180	120%
2017	18,062,811	21,130,663	117%
2018	18,062,811	22,556,832	125%

2019	20,136,187	26,071,158	129%
2020	24,675,000	28,050,242	114%
2021	25,200,145	28,540,540	113%
2022	25,301,215	28,149,987	111%
2023	25,301,215	30,700,870	121%
2024	26,959,506	31,338,220	116%
2025	27,149,447	30,807,015	114%

Table 1-4 Historic kWh savings and costs per kWh achievement

Program Year	Energy (kWh)	Demand (kW)	Total Portfolio Costs	\$/kWh	\$/kW
2011	4,985,328	1,520	\$2,071,159	\$0.42	\$1,363
2012	7,595,741	1,840	\$3,149,264	\$0.41	\$1,712
2013	13,410,729	2,797	\$3,714,378	\$0.28	\$1,328
2014	13,794,070	2,883	\$4,547,079	\$0.33	\$1,577
2015	20,543,040	3,115	\$6,075,144	\$0.30	\$1,950
2016	23,257,180	3,434	\$6,362,822	\$0.27	\$1,853
2017	21,130,663	3,396	\$6,404,252	\$0.30	\$1,886
2018	22,556,832	3,974	\$6,940,945	\$0.31	\$1,747
2019	26,071,158	4,591	\$7,184,464	\$0.28	\$1,565
2020	28,050,242	4,878	\$6,866,723	\$0.24	\$1,408
2021	28,540,540	5,479	\$6,480,491	\$0.23	\$1,183
2022	28,149,987	4,806	\$7,391,967	\$0.26	\$1,538
2023	30,700,870	5,697	\$8,704,948	\$0.28	\$1,522
2024	31,338,220	5,466	\$9,239,192	\$0.29	\$1,691
2025	30,807,015	5,725	\$9,043,374	\$0.29	\$1,580

HIGH-LEVEL RECAP:

The 2025 portfolio produced 30,807,015 kWh, exceeding OG&E's savings goal. These ongoing energy savings will accumulate over the life of the EE measures. The EE portfolio recoverable expenses of \$9,043,374 for 2025 were 88% of the approved annual budget of \$10,283,334.

Customer incentives and rebates account for 50% of the total portfolio expenses.

HIGHLIGHTS OF WELL-PERFORMING PROGRAMS:

The Commercial & Industrial program offerings demonstrated continued success in 2025 under the CEEP umbrella, achieving 119% of the planned savings goal while spending 89% of the budget. This accounted for 31% of the total Portfolio energy savings.

There are five residential channel offerings under the HEEP umbrella. The combined channels achieved 115% of the HEEP savings goal while spending 80% of the planned budget. HEEP accounted for 37% of OG&E's residential portfolio energy savings and penetrates a hard-to-reach customer segment allowing for more customers to participate and be further educated in the energy management of their home.

WHAT'S WORKING AND WHAT'S NOT:

The residential portfolio of EE programs worked well in 2025. The HEEP Program portion of the residential portfolio achieved 115% of energy savings goals while spending 80% of the total HEEP residential filed budget. The current EM&V reports validate the impact and process success of OG&E's residential programs. The CWA achieved 93% of its energy savings goal while spending 92% of its budget. For the 2025 program year CLEAResult continued to implement the CWA channel. Five participating contractors returned and continued to implement weatherization measures for qualified customers. Significant improvements were made to provide additional health and safety benefits to Act 1102 participants as well.

TRAINING ACHIEVEMENTS:

OG&E provided in person and virtual educational sessions with commercial and industrial customers on the benefits of energy efficiency.

EM&V ACTIVITIES:

Qualus LLC (formerly ADM and Associates, Inc., which was acquired by Qualus LLC in July 2025) was selected to perform the evaluation, measurement, and verification ("EM&V") for the entire EE program portfolio for PY 2025. EM&V activities were performed in accordance with the Arkansas Technical Reference Manual ("TRM") Version 10.0. The EM&V report details the findings and are included in Appendix A of this annual report.

LONG-TERM ENERGY SAVINGS:

The current program portfolio was developed to meet the energy efficiency targets established by the APSC in Order No.68 in Docket 13-002-U. The expected kW and kWh savings delivered by this portfolio, estimated kW and kWh savings from future portfolios, and the cumulative kW and kWh savings from previous portfolios are included in the Company's load forecast. The Integrated Resource Plan incorporates this information in its planning report.

EE OVERVIEW:

The following four tables provide an overview of the EE portfolio results for PY2025:

Table 1-5 Portfolio Summary

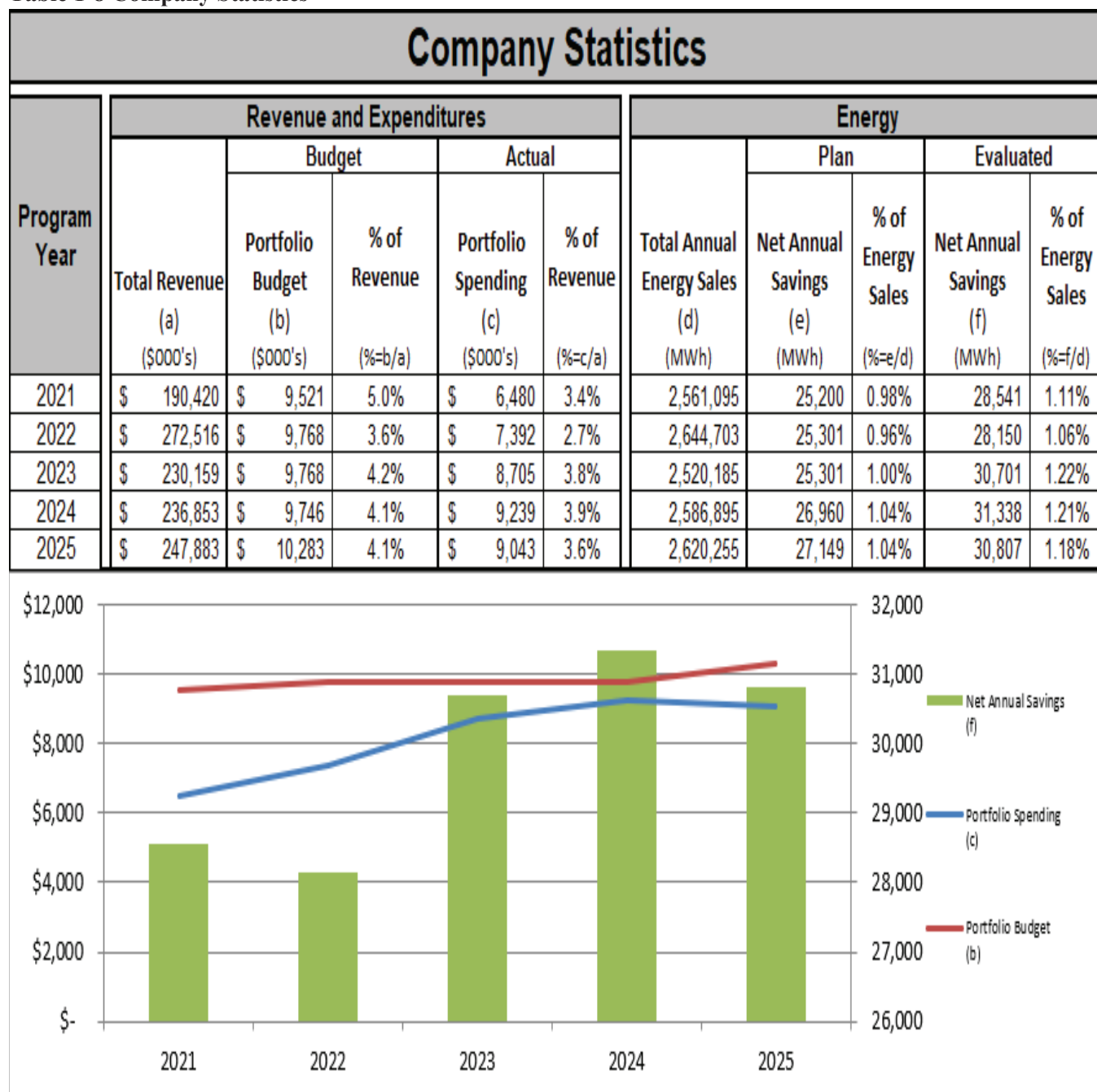
2025 Portfolio Summary										
Net Energy Savings		Costs			Cost-Effectiveness			Goal Achievement		
Demand MW	Energy MWh	Actual Expenditures	LCFC	Performance Incentives	TRC Net Benefits (NPV)	TRC Ratio	PAC Ratio	Commission Established Target % of Baseline	Actual Savings Achieved % of Baseline	% of Target Achieved (%)
6	30,807	\$ 9,043,374	\$ (0)	\$ 822,667	\$ 8,570,424	1.86	1.85	1.20%	1.63%	136%

Table 1-6 Portfolio Costs by Program Summary

EE Portfolio Expenditures by Program					
Program Name	Target Sector	Program Type	2025		% of Budget
			Budget (\$)	Actual (\$)	
Consistent Weatherization Approach_CWA	Residential	Whole Home	3,546,961	3,259,924	92%
Home Energy Efficiency Program	Residential	Other	1,438,882	1,147,021	80%
Commercial Energy Efficiency Program	Small Business/C&I	Custom	5,227,490	4,636,428	89%
Planning	All Classes	Other	70,000	-	0%
Regulatory	-	-	-	-	-
Total			10,283,334	9,043,374	88%

Table 1-7 Portfolio Costs by Type Summary

EE Portfolio Expenditure Summary by Cost Type				
Cost Type	2025 Total Expenditures			
	% of Total	Budget (\$)	Actual (\$)	% of Total
Planning / Design	0%	-	-	0%
Marketing & Delivery	36%	3,675,303	3,410,042	38%
Incentives / Direct Install Costs	52%	5,373,176	4,807,440	53%
EM&V	3%	317,523	236,343	3%
Administration	9%	917,331	589,549	7%
Regulatory	0%	-	-	0%
	100%	10,283,334	9,043,374	100%

Table 1-8 Company Statistics¹¹ Total annual energy sales include self-direct customer sales.

2.0 Portfolio Programs

2.1 Consistent Weatherization Approach

2.1.1 Program Description

This program in previous portfolios was referred to as the Unified Weatherization Program (UWP). It is designed to target residential customers and allow them to participate in the program with no out-of-pocket expense, and it also provides customers the opportunity to actively manage their energy costs. The program targets residential single-family homes which were built 10 or more years ago that are severely energy inefficient, or with an electricity cost per square foot of more than 10 cents. Homes that meet these criteria begin with an energy audit utilizing blower door technology on the structure to capitalize on specific weatherization techniques. The program is designed to upgrade and improve the thermal envelope of the dwelling.

OG&E serves more than 56,000 residential customers in its Arkansas service territory and has estimated there are as many as 30,000 homes in need of weatherization improvements. OG&E transitioned the management of the CWA program to CLEAResult for implementation in the 2021 program year. There are five qualified companies that participate in serving OG&E's customers in this Program, and each contractor is Building Performance Institute (BPI) certified. CLEAResult personnel arrange training sessions to maintain consistent implementation practices across the CWA. Contractors and their crews attend the sessions and receive additional education on the weatherization of homes, both online and in classrooms, for improvement in proper home weatherization techniques. OG&E views the weatherization program as a key component in its EE portfolio and continues to support its success.

Energy-saving equipment or other in-home improvements include: replacement of glass and/or doors, return air cavity sealing, CO detectors, smoke detectors, attic insulation, air infiltration, duct sealing, water heater pipe wrap, low flow shower heads, faucet aerators, water heater jackets, and advanced power strips. Utilizing blower door and duct blaster technology, the contractors can locate and seal larger areas of air infiltration in the homes.

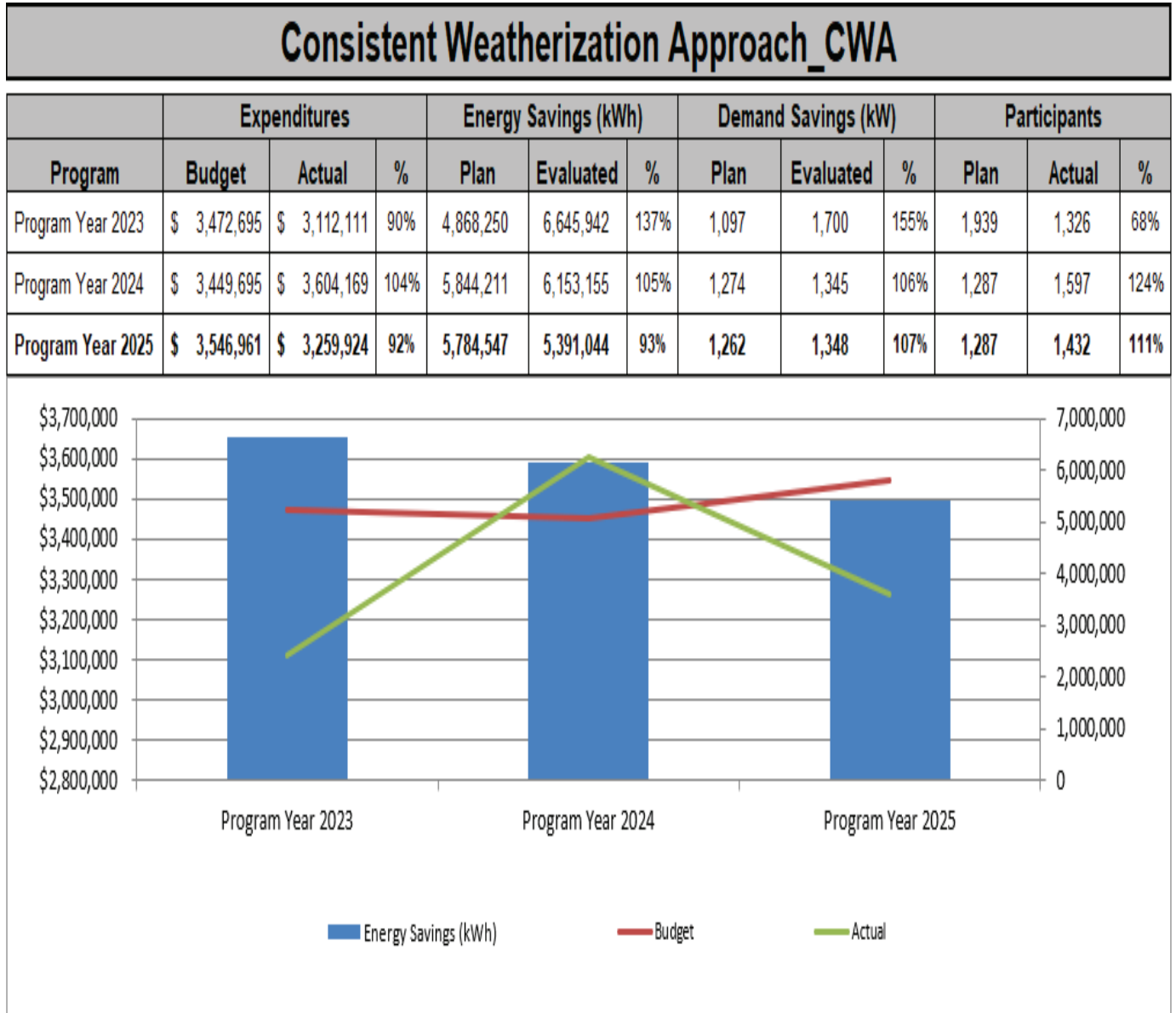
OG&E and AOG continue to work together with contractors to ensure program success. The partnership with AOG has proven to be a successful collaboration for the joint weatherization program. The ability to work together with other utilities is an ongoing effort to combine resources, as well as to reach more customers in overlapping service territories.

2.1.2 Program Highlights

- OG&E weatherized 1,432 homes in 2025.
- The CWA meets the requirements for the Arkansas Consistent Weatherization Approach.

2.1.3 Program Budget, Savings, and Number of Measures

Table 2-1 Consistent Weatherization Approach



2.1.4 Description of Participants

Participants of this program must meet the following criteria:

- The home is 10 or more years old.
- Electricity cost exceeds 10 cents per square foot.

2.1.5 Challenges and Opportunities

- OG&E has maintained a steady pace in obtaining and qualifying customers' homes in a timely manner for weatherization.
- PY2025 maintained a significant increase in spend for Health and Safety. While this increase is positive for the Program, it does create some budgetary constraints.
- As this program continues to mature, long-term lead generation has been necessary for sustained success. There remains a concern moving forward, based on the state's requirements: if OG&E can continue to generate leads that fit the criteria as required by the state.

2.1.6 Planned or Proposed Changes to Program and Budget

- The CWA remains a standalone program in the triennial 2024-2026 portfolio. To comply with Act 1102, OG&E provides a low-income channel in the CWA. To fund this channel, 5% of the current CWA budget is carved out to address Act 1102. A soft cap will be used for installing measures with a maximum of \$3,800 per home. The Act 1102 budgets and goals will continue to be tracked separately to ensure that these customers remain a priority.
- OG&E's budget for PY2026 is \$3,600,352.

2.2 Home Energy Efficiency Program

2.2.1 Program Description

HEEP identifies and serves single and multi-family property owners or managers who seek assistance in improving the efficiency of energy-consuming systems and components. The program provides energy-saving measures at reduced or no out-of-pocket cost for residential customers through several participation channels including Residential Solutions, LivingWise® Schools Outreach, HVAC Replacement and Tune-up, and Consumer Product Solutions. Upgrade measures include but are not limited to: Advanced Power Strips (APS), low-flow showerheads, low-flow faucet aerators, duct sealing, air sealing, and ENERGY STAR® rated windows and pool pumps through residential channels. The Consumer Product Solutions offering includes reduced cost merchandise at the retail point of purchase on advanced power strips, energy efficient water dispensers, outlet gaskets, room air purifiers, and dehumidifiers.

The LivingWise® Schools Outreach channel targeted sixth grade students and is designed to provide an educational opportunity to learn about energy-efficient prospects in their homes. This approach includes an established curriculum that teachers use to review and educate their students regarding activities that can help them save energy. The students are given an energy efficiency kit with easy-to-install measures (e.g., LEDs, aerators, and showerheads) that they take home to have their parents or guardians help them install.

2.2.2 Program Highlights

- The PY2025 program achieved 115% of the energy savings goal.
- The program reached 176 new participants in the HVAC Replacement and Tune-up channel which accounted for 264,023 ex ante gross kWh savings.
- There were 27 rebate applications submitted by residential customers in PY2025. These include 141 windows and 5 pool pump rebates.
- The Consumer Products offering includes instant rebates for customers in select retail establishments that purchased qualified room air purifiers, water dispensers, and outlet gaskets. The dehumidifier offering resulted in 106 customers reached resulting in 9,248 ex ante gross kWh savings. This channel also offered instant rebates on advanced power strips (APS) in select retail locations which were well received by consumers. The rebate resulted in 3,017 APS installations in homes and saved a combined 354,264 kWh. Customers took advantage of the instant rebates on 60 room air purifiers (18,437 kWh), 6 water dispensers (2,891 kWh) and 2,424 outlet gaskets (84,031 kWh).
- In-home Energy Assessments enable the program to identify additional measures that participants with nontraditional dwellings qualify for that complement the CWA

program. The coordinated effort between HEEP and CWA continues to allow for implementation of those identified measures.

2.2.3 Program Budget, Savings and Number of Measures

Table 2-2 Home Energy Efficiency Program Summary

Home Energy Efficiency Program												
	Expenditures			Energy Savings (kWh)			Demand Savings (kW)			Participants		
Program	Budget	Actual	%	Plan	Evaluated	%	Plan	Evaluated	%	Plan	Actual	%
Program Year 2023	\$ 1,083,715	\$ 1,036,653	96%	3,458,718	4,103,959	119%	614	786	128%	3,676	6,303	171%
Program Year 2024	\$ 1,213,372	\$ 972,390	80%	2,397,068	2,807,772	117%	720	442	61%	7,118	5,932	83%
Program Year 2025	\$ 1,438,882	\$ 1,147,021	80%	2,721,723	3,137,794	115%	979	613	63%	7,418	13,048	176%

2.2.4 Description of Participants

- Participants within the HEEP Program include:
 - Multi-family residence – two or more storied structures where multiple families reside in multiple units under a single, contiguous roof most often described as apartments, duplexes, triplexes, condominiums, or townhomes.
 - Participants residing in apartment complexes or other multi-family units typically rent rather than own their housing. This arrangement requires OG&E to receive permission from the owner of the properties before EE measures are installed. Because of this arrangement, multi-family customers may be considered hard-to-reach when providing education and opportunities for managing energy use.
 - Single-family residence – one story structures where a single-family group resides in a standalone structure under a single contiguous roof.
 - This channel includes structures traditionally “stick-built” or with wooden framing.

- LivingWise[®] Student Energy Education - this channel focuses on sixth grade students in the public-school system. The kit provides several easily installed EE products for the home, allowing students and parents or guardians to have conversations about using energy efficiently. This program promotes EE education to the future homeowners, so they will understand the impacts of energy conservation and adopt a culture of energy efficiency.

2.2.5 Challenges and Opportunities

- This channel continues to see great success as the program team works with a participating contractor to provide A/C Tune-Ups in single-family homes and apartment complexes located in Fort Smith.
- The program team continues to recruit additional contractors to participate in the A/C Tune-up measures. By expanding this base, additional residential customers could be reached.
- The Positive Energy New Home Construction program launched in 2024, but the year was spent recruiting builders to participate in the Program. In 2025 the Positive Energy New Home Construction program proved to be very successful.

2.2.6 Planned or Proposed Changes to Program and Budget

- No planned changes to Program or Budget.
- OG&E's proposed budget for PY2026 is \$1,514,769.

2.3 Commercial Energy Efficiency Program

2.3.1 CEEP Program Description

CEEP provides incentives to OG&E commercial customers in the Arkansas service territory, encouraging the installation or upgrade of more efficient equipment in energy consuming systems. The program is aligned toward commercial, industrial, public authority, schools, and small business facilities of all sizes. CEEP measures include but are not limited to; LED lighting and fixtures, compressors, variable speed fans, HVAC upgrades, weather stripping, occupancy-based technology, gaskets, strip curtains, refrigeration upgrades, and pre-rinse spray valves.

CEEP recruits and educates customers on the advantages of upgrading their energy systems through direct outreach, educational contacts, and booth displays at local vendor open houses. Many different avenues and strategies are used to encourage customers to upgrade energy consuming systems in each facility. CEEP works with lighting manufacturer representatives, conducting walkthrough audits and performing detailed, custom audits unique to the facilities. Commercial customers benefit from financial incentives, bill savings, and the energy management education the program provides.

2.3.2 Program Highlights

- The CEEP program successfully reached business customers across the service territory. 207 projects were completed in 2025.
- In PY2025 the Large Commercial and Industrial channel alone completed 22 projects for a combined 9,855,218kWh and accounted for 45% of CEEP ex ante savings. Some of the participants in this channel were Kopco Fabrication and Dollar General with LED retrofits, VFD's for Covia, and Lowe's completed a HVAC replacement.
- CEI finished 2025 achieving 3,775,846 annual ex ante kWh savings combined through cohort participation. Pernod Ricard USA LLC was the largest contributor in PY2025 with 1,748,814 kWh savings and Rheem coming closely behind with 1,417,482 kWh savings.

2.3.3 Program Budget, Savings and Number of Measures

Table 2-3 – CEEP Program Summary

Commercial Energy Efficiency Program												
	Expenditures			Energy Savings (kWh)			Demand Savings (kW)			Participants		
Program	Budget	Actual	%	Plan	Evaluated	%	Plan	Evaluated	%	Plan	Actual	%
Program Year 2023	\$ 5,134,343	\$ 4,521,235	88%	16,974,247	19,950,969	118%	3,312	3,211	97%	486	162	33%
Program Year 2024	\$ 5,027,687	\$ 4,662,633	93%	18,718,226	22,377,294	120%	2,944	3,679	125%	290	237	82%
Program Year 2025	\$ 5,227,490	\$ 4,636,428	89%	18,643,176	22,278,177	119%	2,931	3,764	128%	289	207	72%

2.3.4 Description of Participants

Participants in the program included large commercial, industrial, medical facilities, small business, schools, government, and lighting distributor customers.

2.3.5 Challenges and Opportunities

- While the Small Business channel rebounded from a difficult year in PY2023 with a great year in PY2024, PY2025 achieved lower savings. OG&E remains focused on various ways to drive participation in this channel.

2.3.6 Planned or Proposed Changes to Program and Budget

- The PY2024-2026 filing included commercial cookware in the Midstream channel, and the plan is to have those measures fully implemented in PY2026.
- OG&E's proposed budget for PY2026 is \$5,335,176.

3.0 Supplemental Requirements

3.1 Staffing

In 2025, OG&E had a total of 2 Full-Time Equivalents (“FTEs”); 1 FTE managing its EE programs, and EM&V and Administrative support make up the remaining FTE.

3.2 Stakeholders Activities

During 2025, the PWC members continued to be active and engaged participants in matters pertaining to energy efficiency program evaluation and related issues, as directed by Staff. In 2025, the PWC mainly discussed the proposed Potential Study as well as updates to the Technical Reference Manual (“TRM”). Topics included new measures, codes and standards, and Energy Star Updates.

The Parties Working Collaboratively met a total of 7 times in 2025. All but one of these meetings were online; the Technical Forum, held August 6, 2025, in Little Rock was in-person.

Table 1: Summary of PWC Activities in 2025

Date	Title	Topics
1/21/2025	TRM	1. Changes to TRM 2. Complementary AMI Study
3/20/2025	Potential Study	1. Complementary and Potential Study 2. TRM Review Process
5/8/2025	Codes & Standards	1. Codes & Standards 2. Energy Star Updates 3. Potential Measures
5/22/2025	Existing Measure Statuses	1. Existing Measure Statuses 2. New Measure Approvals
7/17/2025	TRM Updates	1. 10.1 Volume 1 and 2 Updates
8/6/2025	Technical Forum	1. In Person Technical Forum
9/10/2025	Commission Questions	1. Commission Questions Discussion

3.3 Information provided to Customer to Promote EE

Please see Appendix B for samples of promotional and educational materials used in the program year.

Appendices to be added in pdf format.

4.0 EM&V Contractor Reports

Qualus LLC provided outcomes for the EM&V results and Cost Benefit Analysis for OG&E's PY2025 Portfolio. OG&E is providing the report in the attached exhibits.

Attachments:

- Attachment A contains Qualus's Evaluation of OG&E's Energy Efficiency Programs and Cost Benefit Analysis

Attachment A: Evaluation of OG&E's Energy Efficiency Programs and Cost Benefit Analysis

Attachment B: Samples of OG&E Promotional and Educational Materials

EVALUATION, MEASUREMENT AND VERIFICATION REPORT FOR THE 2025 ARKANSAS ENERGY EFFICIENCY PORTFOLIO

Pursuant to Section 9 the Rules for Conservation and Energy Efficiency Programs: Annual Reporting Requirements, Order No. 29, Docket No. 06-004-R, May 20, 2014

Submitted To: Oklahoma Gas & Electric

Submitted On: April 15, 2026

Submitted By: Qualus, LLC

QUALUS

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Oklahoma Gas & Electric
OG&E[®]

Acknowledgements

Qualus, LLC (formerly ADM Associates Inc., which was acquired by Qualus LCC in July 2025) would like to acknowledge the many talented individuals who contributed to this evaluation, measurement, and verification (EM&V) report for the program year 2025 (PY2025).

Oklahoma Gas and Electric (OG&E) staff participated in ongoing evaluation deliverable reviews and discussions, attended regular meetings, and responded to follow-up questions, data requests and document requests. They are an ongoing partner in our evaluation efforts.

The Independent Evaluation Monitor (IEM) led by Dr. Katherine Johnson also provided guidance and input throughout the evaluation process.

We also wish to thank CLEAResult Consulting (CLEAResult) and AM Conservation Group, the implementers, and their staff for their insights and information.

Additionally, the following Qualus staff supported the creation of this report.

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Acronyms/Abbreviations

TABLE 0-1 COMMONLY USED ACRONYMS AND ABBREVIATIONS

Acronym	Term
AC	Air Conditioner
ACTU	AC Tune-up
AOH	Annual Operating Hours
APS	Advanced Power Strip
APSC	Arkansas Public Service Commission
C&EE	Conservation and Energy Efficiency
C&I	Commercial and Industrial
CEE	Consortium for Energy Efficiency
CF	Coincidence factor
CFL	Compact Fluorescent Lamp (bulb)
CFM	Cubic feet per minute
DI	Direct Install
DLC	Design Lights Consortium
EEA	Energy Efficiency Arkansas
EER	Energy efficiency ratio
EFLH	Equivalent Full-Load Hours
EISA	Energy Independence and Security Act
EL	Efficiency loss
EM&V	Evaluation, Measurement, and Verification
EPP	Efficient Products Pathway
EUL	Estimated Useful Life
ES	ENERGY STAR®
FR	Free-Rider
GPM	Gallons per minute
HDD	Heating Degree Days
HID	High Intensity Discharge
HOU	Hours of Use
HP	Heat pump
HSP	Home Solutions Program
HSPF	Heating seasonal performance factor
HW	Home Weatherization Pathway
HVAC	Heating, Ventilation, and Air Conditioning
IEF	Interactive Effects Factor
IEM	Independent Evaluation Monitor
IEER	Integrated Energy Efficiency Ratio
IOU	Investor-Owned Utility
IPLV	Integrated Part Load Value
IPMVP	International Performance Measurement and Verification Protocol
ISR	In-service rate
kW	Kilowatt
kWh	Kilowatt-hour
LED	Light Emitting Diode
M&V	Measurement and Verification

Acronym	Term
NC	New Construction
NEB	Non-Energy Benefit
MW	Megawatt
MWh	Megawatt-hour
NGS	Natural Gas Savings
NTG	Net-to-Gross
OLAT	Online Audit Tool
PCT	Participant Cost Test
PY	Program Year
QA	Quality Assurance
QC	Quality Control
RCA	Refrigerant charge adjustment
RIM	Ratepayer Impact Measure
ROB	Replace on Burnout
SBP	Small Business Pathway
SEER	Seasonal Energy Efficiency Ratio
SO	Spillover
TRC	Total Resource Cost
TRM	Technical Reference Manual
UCT	Utility Cost Test
VFD	Variable Frequency Drive

Savings Types

TABLE 2 TYPES OF SAVINGS REFERENCED IN THIS EVALUATION REPORT

Savings Types	Definition
Energy Savings (Therms/kWh)	The change in energy consumption and/or demand that results directly from program-related actions taken by participants in an efficiency program, regardless of why they participated.
Demand Reductions (kW)	The time rate of energy flow. Demand usually refers to electric power measured in kW (equals kWh/h) but can also refer to natural gas, usually as Btu/hr., kBtu/hr., therms/day, etc.
Other Fuels (Electricity, Natural gas, and Liquid Propane)	Other fuel savings, such as electricity, propane and natural gas, which are estimated based on dual fuel savings that are not incentivized by either of the utilities that participated in the project.
Water (Gallons)	Water savings that are reported in association with the installation of water saving devices.
Ex-Ante Gross	Latin for “from something done beforehand” gross savings. The change in energy consumption and/or peak demand that results directly from program-related actions taken by participants in a program, regardless of why they participated.
Ex-Post Gross	Latin for “from something done afterward” gross savings. The energy and peak demand savings estimates reported by the Evaluator after the gross impact evaluation and associated M&V efforts have been completed.
Ex-Post Net	The energy and peak demand savings estimates reported by the Evaluator after application of the results of the net impact evaluation. Typically calculated by multiplying the ex-post gross savings by a NTG ratio.
Annual Savings	Energy and demand savings expressed on an annual basis, or the amount of energy and/or peak demand a measure or program can be expected to save over the course of a typical year. The AR TRM v10.0 provides algorithms and assumptions to calculate annual savings and are based on the sum of the annual savings estimates of installed measures or behavior change.
Lifetime Savings	Energy savings expressed in terms of the total expected savings over the useful life of the measure. Typically calculated by multiplying the annual savings of a measure by its EUL. The TRC Test uses savings from the full lifetime of a measure to calculate the cost-effectiveness of programs.

1 Executive Summary

1.1 Introduction

OG&E provides retail electric services to 69,397 customers¹ in its Arkansas service territory that encompasses the City of Fort Smith and nearby municipalities.

OG&E filed its Arkansas 2024-2026 Energy Efficiency Program Plan (2024-2026 Plan) with the Arkansas Public Service Commission (APSC) on August 1, 2023.² The 2024-2026 Plan complies with Order No. 68, Docket 13-002-U which requires each electric investor-owned utility (IOU) to target savings of 1.2% of 2022 baseline sales. The 2024-2026 Plan was approved by the APSC on November 9, 2023 in Order No. 72, Docket 13-002-U and Order No. 107, Docket 07-075-TF.

The 2024-2026 Plan includes a portfolio of Energy Efficiency Programs (the portfolio) that are designed to achieve reductions in electric energy (kWh) consumption and peak demand (kW) across all of OG&E's Arkansas customers.

In accordance with APSC Rules for Conservation and Energy Efficiency Programs (C&EE Rules), OG&E engaged Qualus LLC (formerly ADM Associates Inc., which was acquired by Qualus LCC in July 2025) to conduct the evaluation, measurement, and verification (EM&V) of its portfolio. Qualus staff, collectively referred to as the Evaluator, conducted independent, third-party EM&V for all programs in the 2025 portfolio. This EM&V report provides a comprehensive description of Qualus's evaluation of OG&E's 2025 Arkansas programs.

1.2 Portfolio Overview

In 2025, OG&E offered a portfolio of three energy efficiency programs, which provided a comprehensive range of customer options focused on energy efficiency and educational options. At a high-level, OG&E designed its programs to achieve the following objectives:

- PY2025 net energy-savings goal³ of 27,149,447 kWh and demand reduction target of 5,171 kW;⁴
- Significant energy-savings opportunities for all customers and market segments;
- Broad ratepayer benefits; and
- Comprehensiveness in seven areas (i.e., comprehensiveness factors) defined by the APSC.⁵

In PY2025, two residential programs and one commercial program were evaluated. The Home Energy Efficiency Program (HEEP), the Consistent Weatherization Approach (CWA) Program, and the Commercial Energy Efficiency Program (CEEP) were all existing programs at the onset of PY2025.

The HEEP is comprised of four different channels:

1 See <https://apps.apsc.arkansas.gov/olsv2/AnnualReportResults-electric.asp>.

2 The 2024-2026 Plan was filed in APSC Docket 07-075-TF.

3 This value was based on the Commission approved target of 1.20% of 2022 sales as set forth by the APSC and includes a reduction from target to account for commercial and industrial customers opting to self-direct.

4 These targets represent first-year net energy and demand savings at the meter.

5 As defined by the APSC in the C&EE Rules of Order No. 17 in Docket 08-144-U.

- Residential Solutions (RSOL): Building envelope improvements; direct install measures; ENERGY STAR® windows; pool pumps; and multifamily direct install and other efficiency measures. RSOL also includes the LivingWise® Schools Outreach Path that provides 6th grade students an educational opportunity to learn about how they can affect the energy efficiency of their home.
- HVAC Replacement & Tune-ups (HVAC): This channel provides incentives to improve operating efficiency of the existing HVAC unit or to replace it with a higher efficiency unit, through a program-approved Trade Ally network
- Consumer Products Solutions (CPS): Upstream incentives for advanced power strip and LED lighting discounts provided through participating retailers.
- Positive Energy Homes – New Construction (PEH): This channel works with builders and contractors to install energy efficient measures on residential new construction.

The CWA Program is comprised of two components (not technically channels or paths):

- Consistent Weatherization Approach (Wx): This weatherization component offers energy efficiency weatherization upgrades to homeowners at no cost, offering direct install measures and home envelope and duct system sealings to reduce air leakage.
- Low Income Weatherization (LI Wx): This weatherization component offers energy efficiency weatherization upgrades to income-qualified customers at no cost, offering direct install measures and home envelope and duct system sealings to reduce air leakage.

The Commercial Energy Efficiency Program (CEEP) is comprised of five Channels:

- Commercial and Industrial Solutions (C&I Solutions) is comprised of prescriptive and custom projects for large C&I customers;
- Small Business Solutions (SBS) is for businesses with less than 150 kW or less peak demand;
- Schools and Government Solutions (SAGE) is for public entities;
- Midstream encourages customers to participate by providing point of sale (POS) discounts on selected products through local lighting distributors; and
- Continuous Energy Improvement (CEI) engage facility and energy managers and identify longer term opportunities.

Table 1-1 Energy Efficiency Portfolio Savings Goals

Program	Channel	Sector	PY2025 Net kWh Goal	PY2025 Net kW Goal
Home Energy Efficiency Program (HEEP)	Residential Solutions (RSOL)	Residential	2,721,723	979
	LivingWise® Schools Outreach (LivingWise)			
	HVAC Replacement & Tune-up (HVAC)			
	Consumer Product Solutions (CPS)			
	Positive Energy Homes (PEH)			
Consistent Weatherization Approach (CWA)	Consistent Weatherization Approach (Wx)	Residential	5,784,547	1,262
	Low Income Pilot (LI Wx)			
Commercial Energy Efficiency Program (CEEP)	Commercial and Industrial (C&I) Solutions	C&I	18,643,176	2,931
	Small Business Solutions (SBS)			
	Schools and Government Entities (SAGE)			
	Midstream			
	Continuous Energy Improvement (CEI)			
Total			27,149,447	5,171
Sums may differ due to rounding.				

shows a list of the PY2025 programs with savings goals and targets by pathway.

TABLE 1-1 ENERGY EFFICIENCY PORTFOLIO SAVINGS GOALS

Program	Channel	Sector	PY2025 Net kWh Goal ⁶	PY2025 Net kW Goal
Home Energy Efficiency Program (HEEP)	Residential Solutions (RSOL)	Residential	2,721,723	979
	LivingWise® Schools Outreach (LivingWise)			
	HVAC Replacement & Tune-up (HVAC)			
	Consumer Product Solutions (CPS)			
	Positive Energy Homes (PEH)			
Consistent Weatherization Approach (CWA)	Consistent Weatherization Approach (Wx)	Residential	5,784,547	1,262
	Low Income Pilot (LI Wx)			
Commercial Energy Efficiency Program (CEEP)	Commercial and Industrial (C&I) Solutions	C&I	18,643,176	2,931
	Small Business Solutions (SBS)			
	Schools and Government Entities (SAGE)			
	Midstream			
	Continuous Energy Improvement (CEI)			
Total			27,149,447	5,171
Sums may differ due to rounding.				

1.3 Evaluation Objectives

The following activities were performed through the EM&V effort:

- Verify program tracking data and correctly apply the AR TRM v10.0 to calculate savings following AR TRM v10.0 Volume 1 Protocol A and estimate gross and net energy impacts at the pathway, program, and portfolio levels;
- Adjust program-reported gross savings using the results of evaluation research, relying primarily on tracking system and engineering desk reviews, on-site verification, and application of accepted protocols such as IPMVP for custom measures and achieve a minimum precision of $\pm 10\%$ of the gross realized savings estimate with 90% confidence at the program level;
- In consultation with the IEM, estimate Net-to-Gross (NTG) ratios, which was performed following AR TRM v10.0 Volume 1 Protocol H and provide complete documentation and transparency of all evaluated savings estimates;
- Provide ongoing technical reviews and guidance to implementers and administrators throughout the evaluation cycle and review tracking system data to assess data captured for new measure offerings following AR TRM v10.0 Volume 1 Protocol A;

⁶ Goal information is from the Docket 07-075-TF Doc 476, Oklahoma Gas & Electric Company: 2024-2026 Energy Efficiency Portfolio Plan for Arkansas, in Kathryn Brewer's Direct Exhibit KNB-1, in table 2 on page 18 of the PDF.

- Support the calculation of portfolio non-energy benefits (NEB) in accordance with AR TRM v10.0 Volume 1 Protocol L;
- Complete process evaluation activities as discussed in Section 3.2;
- Update the assessment of success in achieving the goals and objectives established in the Commissions Comprehensiveness Checklist; and
- As applicable, conduct EM&V research to support updates for the next version of the AR TRM.

1.4 Sections of the Report

This report is structured as outlined below:

- Chapter 1 Executive Summary
- Chapter 2 Evaluation Findings
- Chapter 3 Evaluation Methodology
- Chapter 4 Home Energy Efficiency Program (HEEP)
- Chapter 5 Consistent Weatherization Approach (CWA) Program
- Chapter 6 Commercial Energy Efficiency Program (CEEP)
- Appendix A – Program Surveys
- Appendix B – Cost-effectiveness Analysis
- Appendix C – Survey-based Free-Ridership Results
- Appendix D – C&I Site-level Reports
- Appendix E – Residential Site Visit Findings

2 Evaluation Findings

The portfolio achieved 113.5% of planned net energy (27,149,446 kWh) savings. In addition to verifying the savings reported, the Evaluator calculated lifetime impacts.

Table 2-1 shows the OG&E goals, reported gross impacts, first-year ex-ante gross electric savings and demand reductions (31,970,529 kWh, 5,911.04 kW), gross electric (kWh) realization rate (104.5%), net impacts (30,807,015 kWh, 5,725.03 kW), net-to-gross (NTG) ratio, and net lifetime impacts (434,553,946 kWh). The levelized cost of energy for the portfolio is \$0.034 per kWh.

TABLE 2-1 PORTFOLIO EVALUATION RESULTS

Impact	Metric	HEEP	CWA	CEEP	Portfolio
Energy Savings (kWh)	Goals (Net)	2,721,723	5,784,547	18,643,176	27,149,446
	Ex-Ante (Gross)	3,491,302	5,283,312	21,829,515	30,604,129
	Ex-Post (Gross)	3,212,560	5,539,748	23,218,222	31,970,529
	Realization Rate	92.0%	104.9%	106.4%	104.5%
	Ex-Post (Net)	3,137,794	5,391,044	22,278,177	30,807,015
	NTG Ratio	97.7%	97.3%	96.0%	96.4%
	% of Goal (Net)	115.3%	93.2%	119.5%	113.5%
	Lifetime (Net)	49,595,237	115,328,500	269,630,209	434,553,946
Annual Demand Reductions (kW)	Goals (Net)	979.00	1,262.00	2,931.00	5,172.00
	Ex-Ante (Gross)	658.40	1,309.93	3,712.19	5,680.52
	Ex-Post (Gross)	639.85	1,384.08	3,887.12	5,911.04
	Realization Rate	97.2%	105.7%	104.7%	104.1%
	Ex-Post (Net)	613.02	1,348.31	3,763.70	5,725.03
	NTG Ratio	95.8%	97.4%	96.8%	96.9%
	% of Goal (Net)	62.6%	106.8%	128.4%	110.7%
Sums may differ due to rounding.					

The following subsections provide a summary of the portfolio-level findings and any cross-cutting evaluation activities that occurred over the course of the EM&V effort. Specifically, this includes:

- A summary of EM&V activities and expenditures;
- A summary of program and portfolio performance; and
- High-level findings that cut across programs.

2.1 Summary of Evaluation Effort

Table 2-2 summarizes the total EM&V expenditures and total program expenditures.

TABLE 2-2 OG&E PORTFOLIO EM&V EXPENDITURES

Total EM&V Expenditures	Total Program Expenditures	EM&V as % of Expenditures
\$236,343	\$9,043,374	2.6%

2.1.1 Overview of Data Collection Activities

Specific primary data collection activities are included in the tables below.

TABLE 2-3 SUMMARY OF SITE VISIT DATA COLLECTION EFFORTS

Prog.	Channel	Sample Design Quota	Mode	Total Population	Population Targeted	Completed Site Visits	Call Response Rate	# of Site Visits	Precision
CWA	Wx	30	Phone & email	917	242	27	9.5%	27	16.3%
CWA	LI Wx	15		515	117	14	10.3%	14	22.5%
HEEP	RSOL	30		629	165 ⁷	30	100.0%	30	13.6%
CEEP	Large C&I	13	Desk Reviews	36	13	0	NA	0	0.00%
CEEP	SAGE	5		17	5	0	NA	0	7.75%
CEEP	SBS	10		59	10	0	NA	0	19.83%
CEEP	CEI	6		6	6	0	NA	0	71.99%
CEEP	HVAC	10		10	10	0	NA	0	79.11%
CEEP	Midstream	17		17	17	0	NA	0	57.94%

Table 2-4 summarizes the interview and survey data collection efforts.

TABLE 2-4 SUMMARY OF SURVEY AND INTERVIEW DATA COLLECTION EFFORTS

Prog.	Channel	Type	Mode	# of Times Contacted	Target	Survey Completions	Response Rate
HEEP	PEH	Participating Builders	Email & Telephone	Up to 3	6	2	33%
CEEP	CEI	Participant Survey	Email & Telephone	Up to 3	6	1	17%
	Midstream	Participant Survey	Email	Up to 3	29	3	10%
	SBS	Participant Survey	Email & Telephone	Up to 5 (3 email, 2 phone)	51	1	2%
	Large C&I/SAGE	Participant Survey	Email & Telephone	Up to 5 (3 email, 2 phone)	94	8	9%
	CEEP Trade Allies	Trade Ally Survey	Email & Telephone	Up to 3	9	0	0%

2.2 Summary of Impact Evaluation Findings

Table 2-5 outlines the claimed ex-ante gross energy savings (kWh) and demand reductions (kW).

⁷ There were two multifamily properties that the Evaluator reached out to request unit access for verification work. Both property managers were supportive in the verification efforts. Both properties accounted for a total of 165 units that had a mix of measures installed.

TABLE 2-5 OG&E PORTFOLIO EX-ANTE SAVINGS SUMMARY

Program / Channel	Ex-Ante Energy Savings (kWh)	Ex-Ante Demand Reductions (kW)	Count of Measures	Incentive Spend (\$)
HEEP	3,491,302	658.40	49,258	\$529,067
Residential Solutions	1,667,973	250.22	2,270	\$174,357
Consumer Products	1,056,827	241.29	39,845	\$165,434
Residential HVAC	264,023	101.34	182	\$48,585
LivingWise - School Kits	314,643	34.64	5,920	\$74,651
Positive Energy Homes	187,835	30.91	1,041	\$66,040
CWA	5,283,312	1,309.93	25,407	\$1,938,661
Weatherization	3,504,799	864.23	6,559	\$1,218,542
Low-Income Weatherization	1,778,513	445.70	18,848	\$720,119
CEEP	21,829,515	3,712.19	22,246	\$2,080,646
Midstream	4,970,591	999.99	3,452	\$220,215
Small Business Solutions	1,673,741	280.20	9,211	\$333,366
Schools and Government Efficiency	1,413,483	217.25	6,885	\$294,970
Large C&I	9,855,218	1,287.69	2,663	\$1,146,777
Commercial HVAC	140,637	71.49	29	\$9,300
Continuous Energy Improvement	3,775,846	855.57	6	\$76,017
Portfolio Total	30,604,129	5,680.52	96,911	\$4,548,374
Sums may differ due to rounding.				

Table 2-6 outlines claimed ex-post gross energy and water savings of the programs and pathways.

TABLE 2-6 OG&E PORTFOLIO EX-POST GROSS SAVINGS SUMMARY

Program / Channel	Energy Savings (kWh)	Demand Reductions (kW)	Natural Gas (Therms)	Propane (Gallons)	Water (Gallons)	ARCs (\$)
HEEP	3,212,560	639.85	55,842	675	2,917,926	\$23,932
Residential Solutions	1,684,512	263.99	51,842	0	323,093	\$728
Consumer Products	828,544	216.49	-1,204	0	0	\$23,204
Residential HVAC	267,756	104.85	0	0	0	\$0
LivingWise - School Kits	253,543	27.86	5,050	675	2,580,393	\$0
Positive Energy Homes	178,205	26.65	153	0	14,440	\$0
CWA	5,539,748	1,384.08	168,885	0	197,231	\$16,089
Weatherization	3,717,594	894.18	114,332	0	130,257	\$4,087
Low-Income Weatherization	1,822,155	489.90	54,553	0	66,974	\$12,001
CEEP	23,218,222	3,887.12	-69,627	0	0	\$362,369
Midstream	5,715,989	1,084.66	-43,157	0	0	\$253,926
Small Business Solutions	1,680,382	285.49	-9,975	0	0	\$58,227
Schools and Government Efficiency	1,451,455	221.22	-10,153	0	0	\$34,614
Large C&I	10,299,105	1,321.49	-6,342	0	0	\$15,603
Commercial HVAC	103,847	55.26	0	0	0	\$0
Continuous Energy Improvement	3,967,443	919.00	0	0	0	\$0
Portfolio Total	31,970,529	5,911.04	155,100	675	3,115,158	\$402,390
Sums may differ due to rounding.						

Table 2-7 outlines verified ex-post net energy savings (kWh) and demand reductions (kW) by program and channel.

TABLE 2-7 OG&E PORTFOLIO EX-POST NET SAVINGS SUMMARY

Program / Channel	Ex-Post Net Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)	Ex-Post Net Demand Reductions (kW)	Net-to-Gross Ratio
HEEP	3,137,794	49,595,237	613.02	97.7%
Residential Solutions	1,682,782	32,875,897	263.63	99.9%
Consumer Products	780,068	9,098,746	200.08	94.1%
Residential HVAC	243,197	1,462,753	94.80	90.8%
LivingWise - School Kits	253,543	2,535,428	27.86	100.0%
Positive Energy Homes	178,205	3,622,413	26.65	100.0%
CWA	5,391,044	115,328,500	1,348.31	97.3%
Weatherization	3,568,890	77,325,672	858.42	96.0%
Low-Income Weatherization	1,822,155	38,002,828	489.90	100.0%
CEEP	22,278,177	269,630,209	3,763.70	96.0%
Midstream	5,715,989	78,600,544	1,084.66	100.0%
Small Business Solutions	1,680,382	24,870,275	285.49	100.0%
Schools and Government Efficiency	1,335,339	19,469,390	203.52	92.0%
Large C&I	9,475,177	142,279,642	1,215.77	92.0%
Commercial HVAC	103,847	442,915	55.26	100.0%
Continuous Energy Improvement	3,967,443	3,967,443	919.00	100.0%
Portfolio Total	30,807,015	434,553,946	5,725.03	96.4%

Sums may differ due to rounding.

The contribution to portfolio ex-ante energy savings (kWh) by program is summarized in Figure 2-1. CEEP accounts for the dominant share, contributing 71% of reported ex-ante portfolio savings. The CWA Program provides a secondary contribution, representing 17% of reported ex-ante savings for the portfolio, while HEEP contributes the remaining 12%. The distribution highlights the strong influence of CEEP as well as the complementary contributions of the residential program offerings.

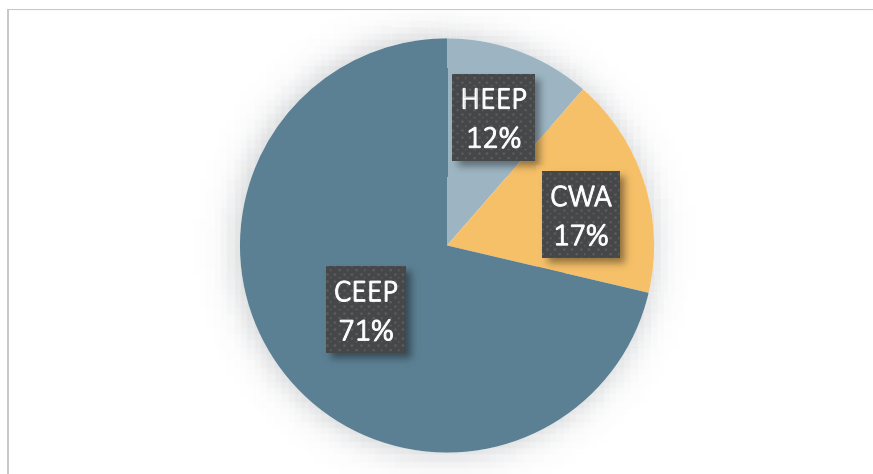


FIGURE 2-1 CONTRIBUTION TO PORTFOLIO EX-ANTE KWH SAVINGS BY PROGRAM

The following figures represent the contribution of ex-ante gross energy savings (kWh), by end use⁸ and sector for each program. For HEEP (

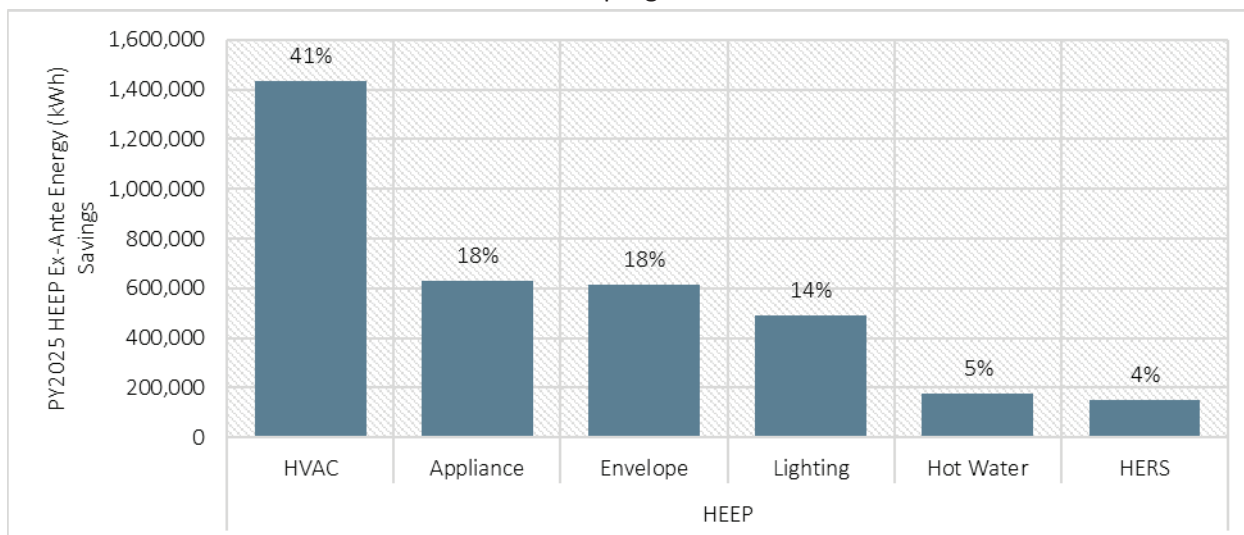


Figure 2-2), most savings (41%) were associated with HVAC end uses, followed by appliances (18%) and envelope end uses (18%). For the CWA Program, reported gross ex-ante savings were dominated by HVAC (51%) and envelope (41%) end uses. Finally, for CEEP, lighting (45%) and custom (36%) end uses represent the highest reported gross ex-ante savings.

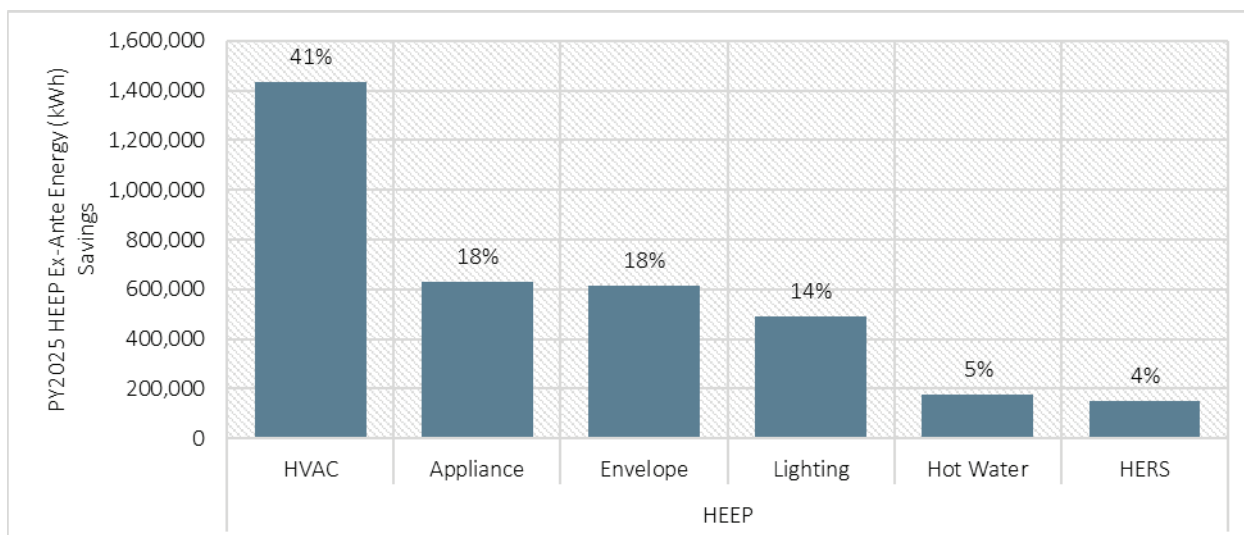


FIGURE 2-2 EX-ANTE GROSS ENERGY SAVINGS (KWH) BY END USE FOR HEEP

⁸ End use is defined within the AR TRM. The end use selected will match the correlating section heading in the TRM (e.g., aerators are within Domestic Hot Water Measures, etc.). In the case of the educational category, this captures incentives spent on educational efforts, such as assessments (virtual or otherwise).

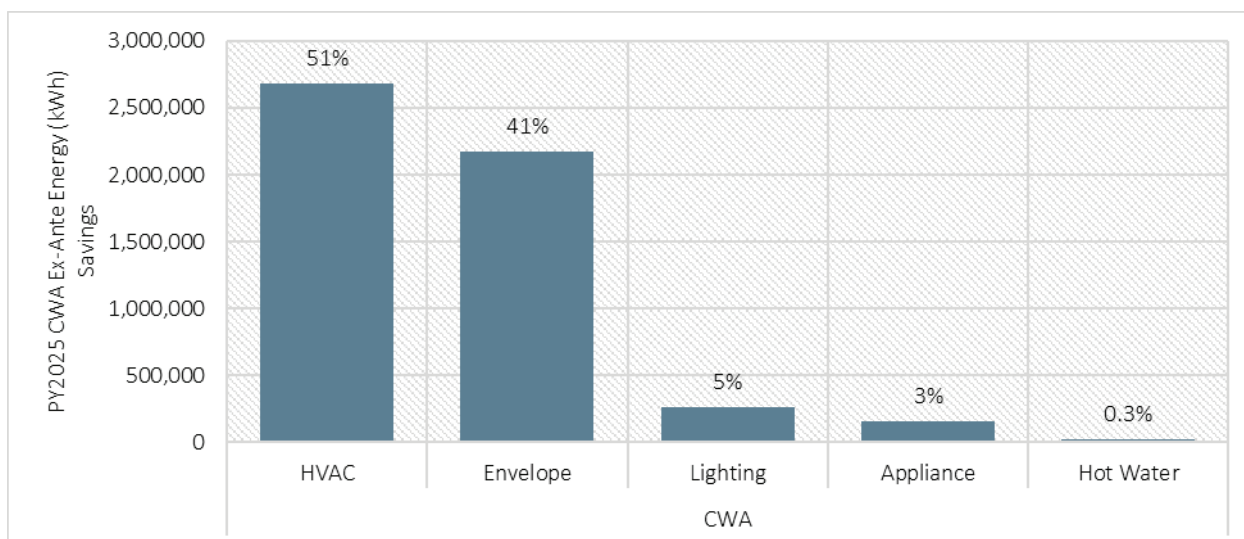


FIGURE 2-3 EX-ANTE GROSS ENERGY SAVINGS (kWh) BY END USE FOR THE CWA PROGRAM

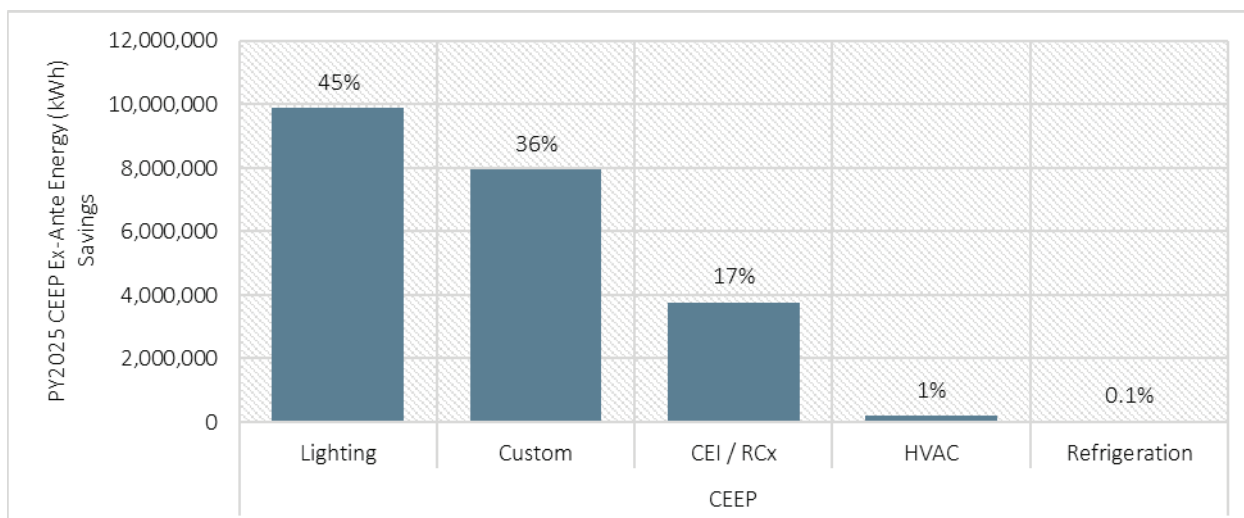


FIGURE 2-4 EX-ANTE GROSS ENERGY SAVINGS (kWh) BY END USE FOR CEEP

The figure below shows the contributions to ex-ante gross energy savings (kWh) for measures in HEEP. For HEEP, duct sealing (31%), advanced power strips (17%), LED lamps (14%), and air infiltration (14%) are the HIMs in the program and equal 76% of program ex-ante energy savings (kWh).

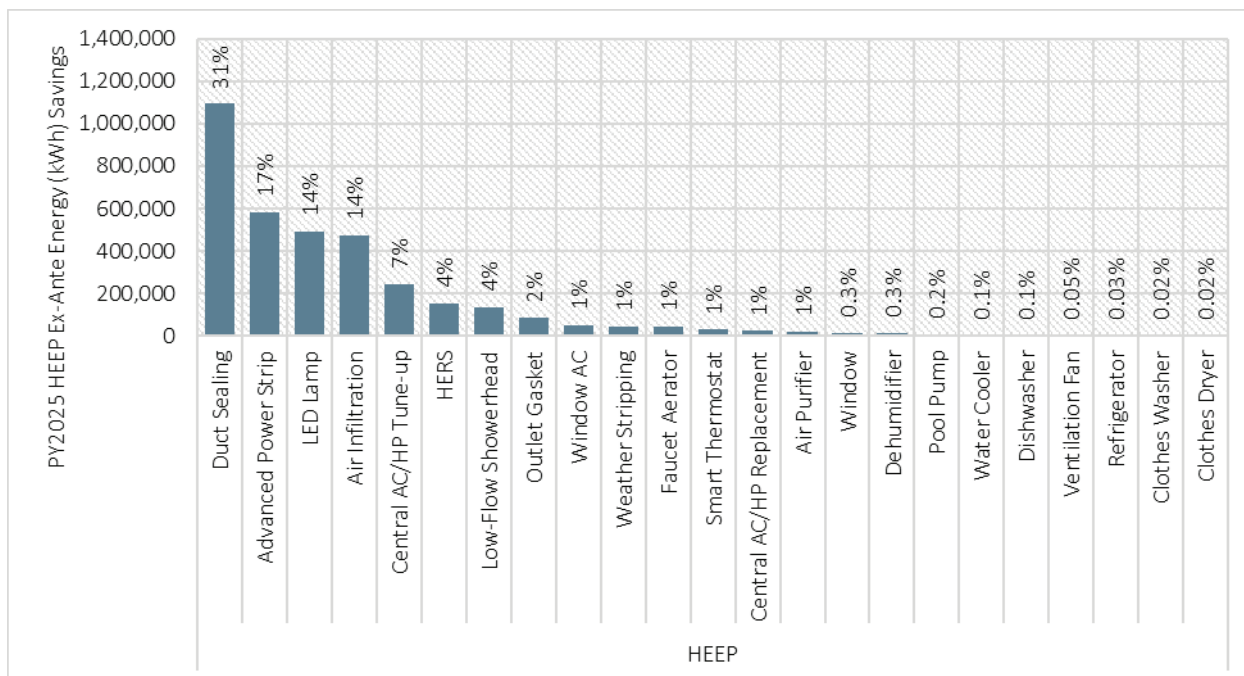


FIGURE 2-5 EX-ANTE GROSS (KWH) BY MEASURE IN THE HEEP

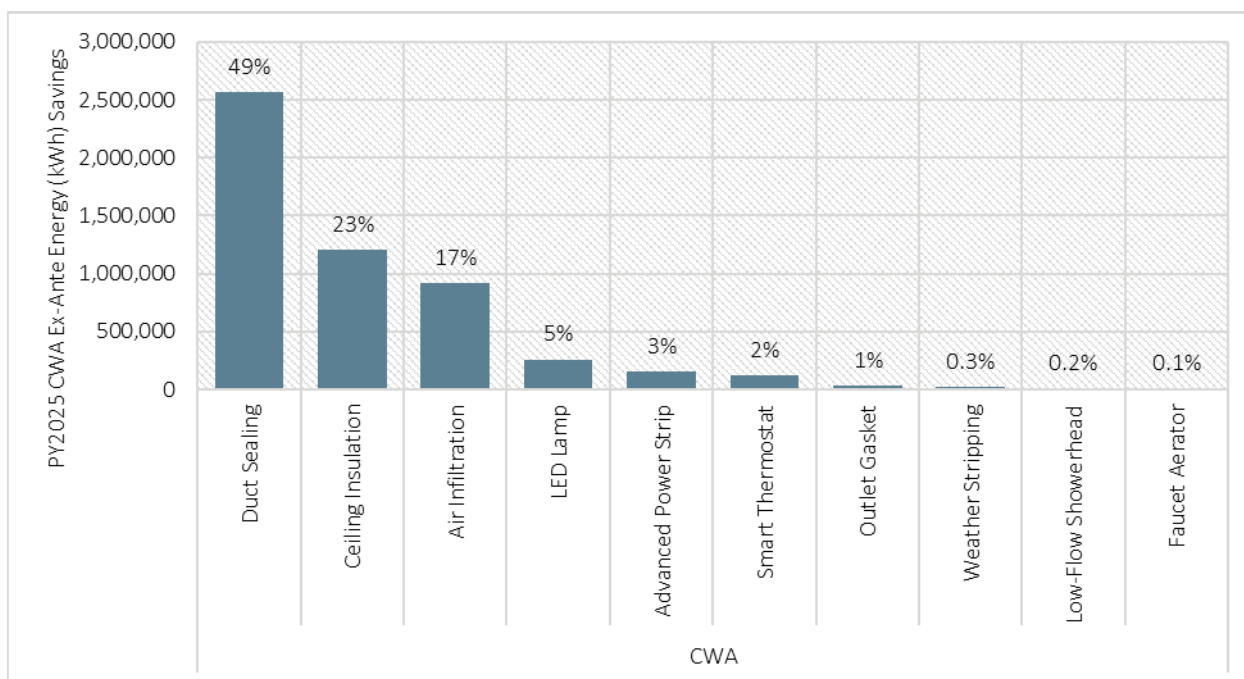


Figure 2-6 shows the contributions to ex-ante gross energy savings (kWh) for each measure in the CWA Program. For the CWA Program, duct sealing (49%), ceiling insulation (23%), and air infiltration (17%), are the three HIMs, and equal 89% of program ex-ante energy savings (kWh).

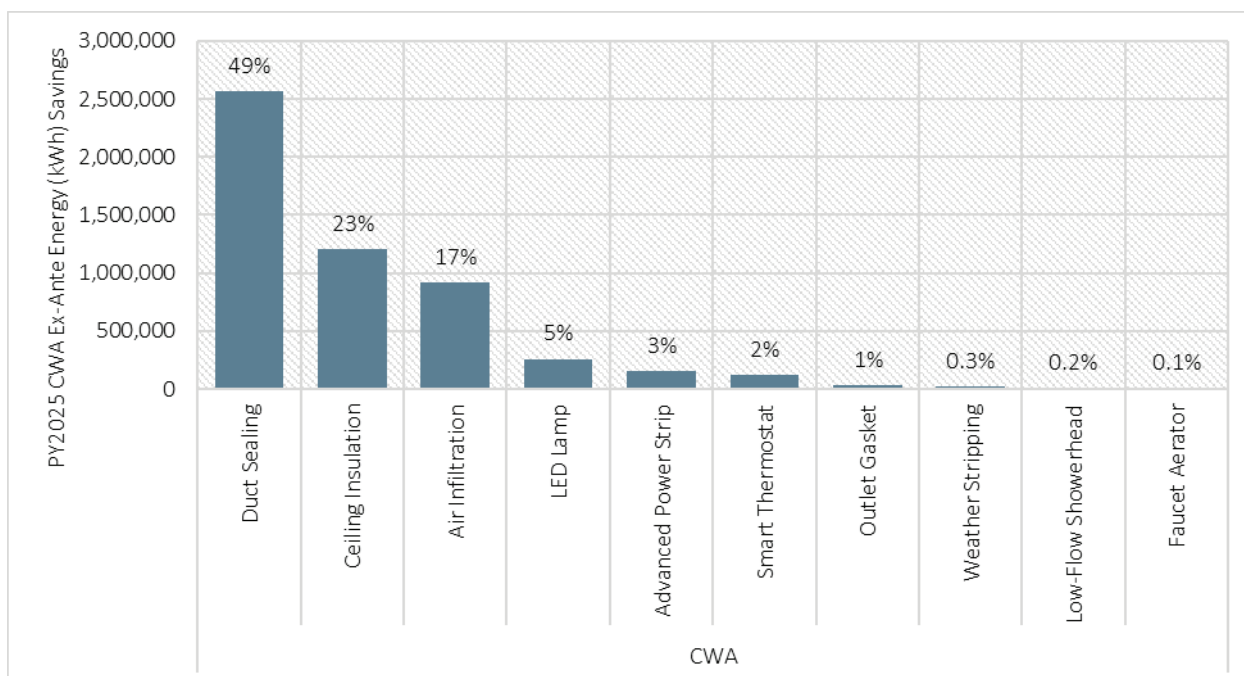


FIGURE 2-6 EX-ANTE GROSS (kWh) BY MEASURE IN THE CWA PROGRAM

The figure below shows the contributions to ex-ante gross energy savings (kWh) for each measure in CEEP. For CEEP, lighting (45%), motors / VFDs (28%), and CEI energy management projects (17%), are the HIMs for the program and equal 91% of program ex-ante energy savings (kWh).

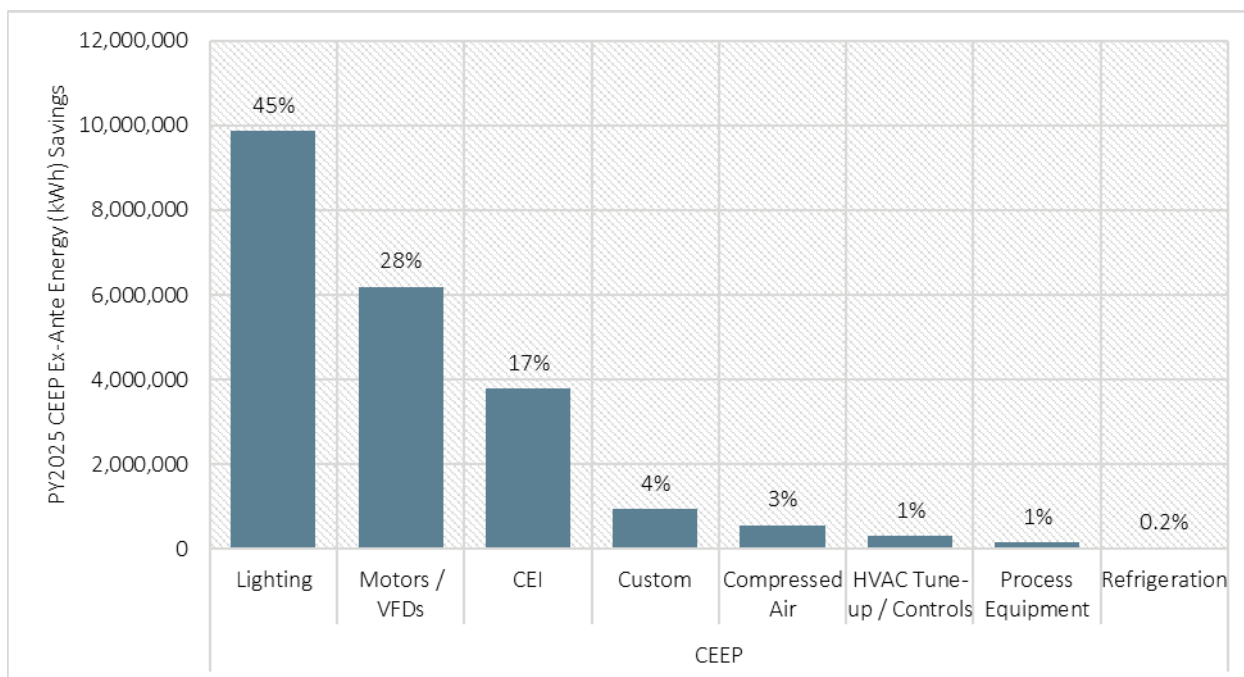


FIGURE 2-7 EX-ANTE GROSS (kWh) BY MEASURE IN THE CEEP

Table 2-8 summarizes the performance against goals of programs evaluated in this report. Estimated channel-level net energy savings (kWh) goals for each program are based on the share of ex-post net energy savings (kWh) savings.

TABLE 2-8 PERFORMANCE AGAINST GOALS

Program / Channel	Net kWh Savings Goal	Net kWh Savings	% of Goal Attained
HEEP	2,721,723	3,137,794	115.3%
Residential Solutions	1,459,645	1,682,782	115.3%
Consumer Products	676,631	780,068	115.3%
Residential HVAC	210,949	243,197	115.3%
LivingWise - School Kits	219,923	253,543	115.3%
Positive Energy Homes	154,575	178,205	115.3%
CWA	5,784,547	5,391,044	93.2%
Weatherization	3,829,390	3,565,094	93.2%
Low-Income Weatherization	1,955,157	1,822,155	93.2%
CEEP	18,643,176	22,278,177	119.5%
Midstream	4,783,345	5,715,989	119.5%
Small Business Solutions	1,406,204	1,680,382	119.5%
Schools and Government Efficiency	1,117,459	1,335,339	119.5%
Large C&I	7,929,167	9,475,177	119.5%
Commercial HVAC	86,903	103,847	119.5%
Continuous Energy Improvement	3,320,098	3,967,443	119.5%
Portfolio Total	27,149,446	30,807,015	113.5%
Sums may differ due to rounding.			

The budgets and actual spending are summarized in Table 2-9 below.

TABLE 2-9 SUMMARY OF BUDGETS AND ACTUAL SPEND

Program	Budget (\$)	Actuals (\$)	Percent of Budget Spend
HEEP	\$1,438,883	\$1,147,021	79.7%
CWA	\$3,546,961	\$3,259,924	91.9%
CEEP	\$5,227,490	\$4,636,428	88.7%
Regulatory	\$0	\$0	0.0%
Planning	\$70,000	\$0	0.0%
Portfolio Total	\$10,283,334	\$9,043,374	87.9%
Sums may differ due to rounding.			

2.3 Summary of Cost-Effectiveness Evaluation Findings

Table 2-10 outlines the results from the cost-effectiveness analysis by program, along with the net benefits for the total resource cost (TRC) test.

TABLE 2-10 COST-EFFECTIVENESS BY PROGRAM⁹

Program	TRC	UCT	RIM	PCT	TRC Net Benefits
HEEP	1.75	1.64	0.45	5.57	\$1,072,784
CWA	1.35	1.40	0.48	3.65	\$1,464,253
CEEP	2.40	2.23	0.46	11.80	\$6,033,388
Regulatory	0.00	0.00	0.00	0.00	\$0
Planning	0.00	0.00	0.00	0.00	\$0
Total	1.86	1.85	0.46	6.45	\$8,570,424
Sums may differ due to rounding.					

In PY2025, the TRC ratio increased to 1.86 from 1.67 in PY2024, with net benefits totaling \$8,558,843. This increase is primarily attributed to higher avoided utility costs used in the cost-effectiveness analysis for PY2025 compared to those in PY2024. Additionally, there were increases in avoided costs associated with natural gas NEBs savings for HEEP and CWA, driven by a reduction in LED lamps and therefore fewer heating penalties. There were fewer NEBs for the CEEP with the reduction of lighting retrofit projects.

The incorporation of Non-Energy Benefits (NEB) into cost-effectiveness testing in Arkansas has resulted in a change in the relational pattern across the various benefit-cost ratios. For example, HEEP and CWA have a higher TRC than UCT. Under a narrower approach to TRC (without NEB), the TRC would always be lower than the UCT under the assumption that incentives are less than or equal to incremental cost. However, with NEB included the TRC score for this program is greater than the UCT score because the aggregate impact of the NEB and the penalty to benefits from the negative gas interaction benefit is still of greater magnitude than the difference between measure incremental costs and incentive levels.

⁹ Cost-effectiveness is evaluated and reported by program and portfolio, not the pathway. Per Section 6: Benefit/Cost Tests of the Rules for Conservation and Energy Efficiency Program filed in Docket: 10-101-R.

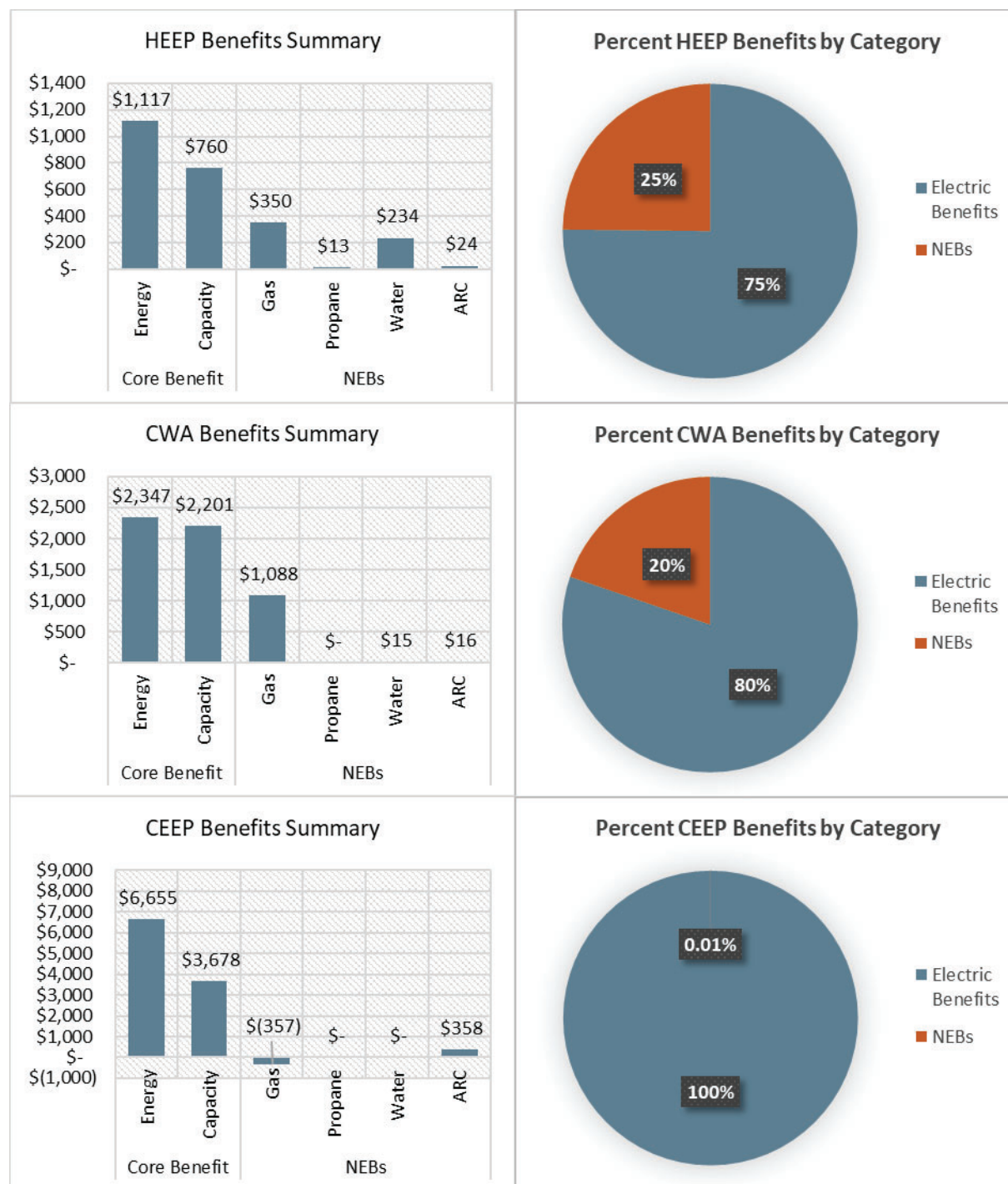


FIGURE 2-8 NEB BENEFIT SUMMARY BY PROGRAM

2.3.1 Cost-Effectiveness Methodology

See Appendix B of this report for additional details on the Evaluator's approach and results.

2.3.2 Non-Energy Benefits

The ex-post gross, and ex-post net Non-Energy Benefits (NEB) are shown in the tables below.

TABLE 2-11 EX-POST GROSS NON-ENERGY BENEFIT SUMMARY

Program / Channel	Gross Natural Gas (therms)	Gross Water (gal)	Gross Propane (gal)	Gross ARCs (\$)	Gross DRCs (\$)
HEEP	55,842	2,917,926	675	\$23,932	\$0
Residential Solutions	51,842	323,093	0	\$728	\$0
Consumer Products	-1,204	0	0	\$23,204	\$0
Residential HVAC	0	0	0	\$0	\$0
LivingWise - School Kits	5,050	2,580,393	675	\$0	\$0
Positive Energy Homes	153	14,440	0	\$0	\$0
CWA	168,885	197,231	0	\$16,089	\$0
Weatherization	114,332	130,257	0	\$4,087	\$0
Low-Income Weatherization	54,553	66,974	0	\$12,001	\$0
CEEP	-69,627	0	0	\$362,369	\$0
Midstream	-43,157	0	0	\$253,926	\$0
Small Business Solutions	-9,975	0	0	\$58,227	\$0
Schools and Government Efficiency	-10,153	0	0	\$34,614	\$0
Large C&I	-6,342	0	0	\$15,603	\$0
Commercial HVAC	0	0	0	\$0	\$0
Continuous Energy Improvement	0	0	0	\$0	\$0
Portfolio Total	155,100	3,115,158	675	\$402,390	\$0

Sums may differ due to rounding.

TABLE 2-12 EX-POST NET NON-ENERGY BENEFIT SUMMARY

Program / Channel	Net Natural Gas (Therms)	Net Water (gal)	Net Propane (gal)	Net ARCs (\$)	Net DRCs (\$)
HEEP	55,762	2,917,926	675	\$23,932	\$0
Residential Solutions	51,842	323,093	0	\$728	\$0
Consumer Products	-1,284	0	0	\$23,204	\$0
Residential HVAC	0	0	0	\$0	\$0
LivingWise - School Kits	5,050	2,580,393	675	\$0	\$0
Positive Energy Homes	153	14,440	0	\$0	\$0
CWA	164,311	192,021	0	\$15,925	\$0
Weatherization	109,758	125,047	0	\$3,924	\$0
Low-Income Weatherization	54,553	66,974	0	\$12,001	\$0
CEEP	-68,307	0	0	\$358,352	\$0
Midstream	-43,157	0	0	\$253,926	\$0
Small Business Solutions	-9,975	0	0	\$58,227	\$0
Schools and Government Efficiency	-9,341	0	0	\$31,845	\$0
Large C&I	-5,835	0	0	\$14,355	\$0
Commercial HVAC	0	0	0	\$0	\$0
Continuous Energy Improvement	0	0	0	\$0	\$0
Portfolio Total	151,766	3,109,947	675	\$398,210	\$0

Sums may differ due to rounding.

The Net Present Value (NPV) of NEB for each program and pathway are shown in the table below.

TABLE 2-13 NET PRESENT VALUE (NPV) OF NON-ENERGY BENEFITS (NEB)

Channel	NPV NGS (\$)	NPV LPGS (\$)	NPV Water (\$)	NPV ARC (\$)	NPV DRC (\$)
HEEP	\$349,697	\$234,012	\$12,685	\$23,932	\$0
Residential Solutions	\$335,184	\$25,875	\$0	\$728	\$0
Consumer Products	-\$6,449	\$0	\$0	\$23,204	\$0
Residential HVAC	\$0	\$0	\$0	\$0	\$0
LivingWise - School Kits	\$20,280	\$206,656	\$12,685	\$0	\$0
Positive Energy Homes	\$682	\$1,481	\$0	\$0	\$0
CWA	\$1,088,150	\$15,378	\$0	\$15,925	\$0
Weatherization	\$728,793	\$10,015	\$0	\$3,924	\$0
Low-Income Weatherization	\$359,356	\$5,364	\$0	\$12,001	\$0
CEEP	-\$356,892	\$0	\$0	\$358,352	\$0
Midstream	-\$221,337	\$0	\$0	\$253,926	\$0
Small Business Solutions	-\$53,742	\$0	\$0	\$58,227	\$0
Schools and Government Efficiency	-\$50,357	\$0	\$0	\$31,845	\$0
Large C&I	-\$31,457	\$0	\$0	\$14,355	\$0
Commercial HVAC	\$0	\$0	\$0	\$0	\$0
Continuous Energy Improvement	\$0	\$0	\$0	\$0	\$0
Portfolio Total	\$1,080,954	\$249,390	\$12,685	\$398,210	\$0
Sums may differ due to rounding.					

2.3.3 Cost of Carbon

The Evaluator has incorporated a low, medium, and high value for the cost of carbon. The cost-effectiveness results are presented in these three different scenarios.

For additional details, see Appendix B.4.

2.3.4 Marginal Line Losses

The Evaluator used marginal line losses provided by OG&E.

For additional details, see Appendix B.5.

2.3.5 Avoided Costs and Real Economic Carrying Charge

The Evaluator included avoided costs using the Real Economic Carrying Charge (RECC) approach.

For additional details, see Appendix B.6.

2.4 Summary of Evaluation Findings and Recommendations

Below is an overview of the evaluation findings, by program, for the PY2025 programs.

2.4.1 HEEP: Key Findings and Recommendations

2.4.1.1 Residential Solutions Channel

Residential Solutions functions primarily as a feeder and complementary channel within the broader residential portfolio rather than a standalone delivery mechanism. Staff described the single-family assessment component as an entry point used to determine eligibility for comprehensive weatherization

services, with qualified customers transitioning to CWA. Participation is weighted toward multi-family direct-install measures, with marketing and trade ally support integrated into broader residential outreach efforts.

The Residential Solutions channel achieved 101.0% of expected kWh savings and 105.5% of expected kW reductions. The channel performed well as most of the measures had kWh realization rates that were > 90.0%. The channel measure mix remained mostly unchanged from PY2024, as there was no wall insulation offered in PY2025.

Advanced power strips installed in multifamily dwellings had a slightly lower ISR. Through on-site visit verification, the Evaluator calculated an on-site visit ISR of 66.7%, noting that 2 of the 6 units were not being used. Tenants were provided with the APS units but were not in-use at the time of the visit. The Evaluator aggregated ISRs from literature reviews and historical on-site visits to calculate an ISR to apply. For more details about ISRs applied, please see Section 3.1.1.7.2.

- **Recommendation 1:** Program staff may consider directing trade allies to engage with the multifamily tenants to determine a more permanent installation location and peripherals to provide power to. Trade allies may consider providing assistance to the tenants in setting up the APS unit(s) before moving on to other measures in the home.

2.4.1.2 LivingWise® Schools Outreach Channel

LivingWise is an education-focused outreach Channel with standardized implementation and data collection processes managed by a third-party implementer. The program delivers energy efficiency education through classroom curriculum and take-home kits, supported by teacher recruitment, bulk kit distribution, and survey-based data collection. Staff reported stable participation and sufficient survey returns.

2.4.1.3 HVAC Replacement and Tune-Up Channel

The HVAC channel achieved 101.4% of expected kWh savings and 103.5% of expected kW reductions. Overall, the HVAC measures performed well, despite discrepancies in methodologies. There were differences in baseline EER2 assumptions for the central AC/HP replacements that drove the kW realization rates above 100.0%. Program staff are aware of calculation errors and have revised their calculators, noting revised estimations will be implemented in PY2026.

The HVAC channel is delivered through highly standardized protocols with robust training, data capture, and quality assurance requirements. Tune-ups are performed by trained contractors using proprietary diagnostic tools and digital data collection, followed by multi-step review and QA/QC verification. Replacement rebates rely on post-purchase applications with desk reviews and limited on-site verification.

2.4.1.4 Consumer Product Solutions Channel

The CPS channel achieved 78.4% of expected kWh savings and 89.7% of expected kW reductions. Despite a few measure calculation discrepancies, the channel performed well, achieving 101.5% of expected kWh savings for non-Food Bank LED measures.

Food Bank LED lamps claimed slightly higher per-unit ex-ante estimations in PY2025. There were a few discrepancies in calculation assumptions, namely hours of use, that resulted in overinflated ex-ante estimations and fewer verified ex-post savings. Program staff acknowledged and are aware of the discrepancies in their calculations and have revised their calculations. Revisions are anticipated to be implemented in PY2026.

The Consumer Product Solutions Channel relies primarily on upstream retail incentives supported by consistent retail engagement and invoice-based verification. Most activity occurs through point-of-purchase markdowns at participating retailers, supplemented by limited downstream rebates for smart thermostats. Staff described regular in-store visits, standardized point-of-purchase materials, and multi-level invoice reviews as key mechanisms to ensure compliance and accurate incentive processing.

2.4.1.5 Positive Energy Homes Channel

The Positive Energy Homes Channel is in an early stage of implementation, with processes and protocols largely established. The program offers tiered incentives based on modeled energy savings, with additional bonuses for high-impact measures such as slab insulation and full foam encapsulation. Multifamily projects are eligible under a flat per-unit incentive structure, though RESNET sampling protocols for multifamily have not yet been applied in Arkansas. Quality assurance is robust, incorporating multiple inspections and desk reviews, but the program pipeline is still developing following an initial pilot phase focused on recruitment and setup.

Verification and QA/QC processes are strong and exceed minimum industry standards. The program employs certified HERS raters, conducts two-stage inspections, performs 100% desk reviews and approximately 10% field QA, and follows RESNET protocols. These practices are comparable to or more rigorous than many peer utilities. For multifamily, RESNET sampling is available but not yet implemented.

Builders participating in the Positive Energy Homes program receive marketing support materials, including flyers for open houses and certificates demonstrating home efficiency. These resources are intended to help builders communicate program participation and energy performance benefits to prospective buyers. Both survey respondents reported that they actively promote the certification, primarily through yard signage and verbal sales pitches. However, marketing efforts are limited to these channels, with no reported use of brochures, websites, MLS listings, or social media.

- **Recommendation 1:** Evaluate builder utilization of provided marketing materials and identify barriers to broader use. Consider offering guidance or additional resources to help builders integrate these materials into their sales strategies. Improving adoption of marketing tools can enhance buyer awareness of energy-efficient homes and increase program visibility.

Program participants expressed extremely high satisfaction with all aspects of the Positive Energy Homes program, including interactions with staff, outreach, paperwork processes, incentives, and overall experience. Both respondents rated every category at the highest level (“extremely satisfied”) and reported that program information provided at events was “very useful.” In addition to these satisfaction ratings, builders emphasized the value of the independent HERS rating, with both respondents indicating it provides a “great advantage” in selling homes. This suggests that the HERS rater’s role not only supports

program quality assurance but also enhances the marketability of energy-efficient homes, reinforcing the program's appeal to builders.

The program employs targeted recruitment strategies, including outreach through homebuilder associations, sponsorship of industry events, and direct engagement with builders identified via association lists and RESNET-provided contacts. These efforts have helped establish a growing pipeline of participants during the program's early implementation phase.

- **Recommendation 2:** Consider expanding recruitment efforts to increase the number of participating builders. Expanding recruitment through these tactics can broaden the builder pipeline, leverage builder credibility, and increase customer awareness of energy-efficient homes, ultimately supporting program growth. Tactics to achieve this could include:
 - Peer-to-Peer Recruitment: Engage satisfied builders as ambassadors to share success stories and encourage participation.
 - Referral Incentives: Offer recognition or small bonuses for builders who refer others to the program.
 - Digital Outreach: Use targeted online ads, webinars, or virtual information sessions to reach builders not active in associations.
 - Showcase Projects: Develop case studies or short videos highlighting completed Positive Energy Homes to demonstrate program benefits for both builders and prospective homebuyers. If a builder with strong program performance is willing to participate, consider creating a video walkthrough where the builder explains the home's energy-efficient features. This approach not only promotes the program but can also provide additional business opportunities for the featured builder by showcasing their expertise and quality work.

The Positive Energy Homes program design is generally consistent with common practice among benchmarked utility residential new construction programs, particularly in its use of performance-based, tiered incentives, builder-paid rebates, and HERS-based third-party verification. Peer programs similarly rely on modeled energy savings, staged inspections, and standardized QA/QC protocols. However, compared to many benchmark utilities, the OG&E design places less emphasis on ENERGY STAR alignment, certification premiums, electrification, and solar-ready requirements, representing opportunities to expand technical scope and market signaling.

2.4.2 CWA: Key Findings and Recommendations

The Weatherization and Low-Income Weatherization components achieved a combined 104.9% of expected kWh savings and 105.7% of expected kW reductions. The Evaluator did not find discrepancies in ex-ante estimations. The slightly higher realization rates are attributed to the ISRs that have been applied to each of the respective measures.

Arkansas uses a statewide approach to residential weatherization, and the Consistent Weatherization Approach (CWA) reflects OG&E's implementation of that framework. The program is delivered through certified contractors and includes a defined package of weatherization and health and safety measures, with incentive payments tied to verified duct sealing and air sealing performance thresholds.

Program oversight relies on documented project review and a combination of desk-based verification and field inspections for a sample of completed homes. Contractors are required to meet BPI certification requirements, and project documentation is reviewed prior to incentive payment. Marketing and customer acquisition for CWA are integrated with other OG&E residential offerings and adjusted over time based on program activity and demand. Staff described the contractor network as stable, with interest from additional contractors anticipated in future program years.

2.4.3 CEEP: Key Findings and Recommendations

The marketing strategy relies heavily on relationship-based, direct engagement rather than broad outreach, which aligns with program design, but limits reach to customers without existing touchpoints. Marketing and outreach are primarily delivered through account executives, community affairs staff, and CLEAResult's local teams, with no paid media or large-scale advertising. This model leverages trusted relationships, particularly for C&I Solutions, SAGE, and CEI. Survey findings reflect this structure: most downstream participants first learned about the program from CLEAResult or contractors, with relatively few citing OG&E representatives or the website.

Customer awareness is shaped primarily by intermediaries rather than by OG&E-owned marketing channels. Although program materials use consistent themes emphasizing cost savings, incentives, and expert guidance, downstream customers typically learn about the program through CLEAResult staff, contractors, or colleagues, and midstream participants rely heavily on distributor recommendations and the availability of point-of-sale discounts. Only a small share of respondents reported learning about the program through the OG&E website or direct OG&E communications. This pattern reflects the program's delivery model, where trade allies, distributors, and outreach staff serve as the primary marketing touchpoints rather than OG&E-owned channels.

Trade allies are integral to program delivery, especially for Small Business Solutions, and the implementer provides structured recruitment, onboarding, and training to support their role. Trade allies serve as the primary delivery partners for small business projects and support C&I and SAGE customers when installation services are required. Recruitment is targeted toward contractors capable of delivering lighting and other eligible small-business measures, and customers receive an approved trade ally list to facilitate project completion. The implementation contractor provides annual kickoff trainings, onboarding for new trade allies, and additional training when program requirements or tools change. This structured approach ensures that trade allies remain informed about program processes, documentation requirements, and qualified products.

Overall, the QA/QC framework appears appropriately scaled to the risk profile and delivery characteristics of each channel. Higher-risk programs receive more intensive verification, while lower-risk or market-based offerings rely on data-driven controls. Interviews did not identify material gaps in inspection coverage or independence of review, and the division of responsibilities between the implementer and OG&E provides separation between delivery, verification, and incentive payment functions.

This framework is implemented through channel-specific QA/QC requirements managed by a team separate from program delivery. All channels undergo desk reviews to verify documentation completeness, savings calculations, and equipment eligibility. Field inspection protocols vary by program

type: Small Business Solutions applies a graduated inspection model, including 100% inspections for new or probationary trade allies and randomized post-installation inspections thereafter that often exceed the 20% minimum requirement. C&I Solutions and SAGE require 100% pre- and post-installation inspections for all projects, supplemented by engineering review for custom measures. In the midstream channel, QA/QC focuses on data integrity and incentive application, including cross-checks to prevent double counting. CEI relies on performance-based verification using modeled baselines rather than installation-level review. In addition to implementer-managed QA/QC activities, OG&E conducts monthly data reviews and semiannual reconciliation of incentive payments, providing an additional layer of oversight.

The portfolio's measure mix follows patterns typical of C&I programs where lighting measures are the primary contributor to savings in programs targeting the small business, schools, governments, and nonprofits segments. Notably, the Large C&I and CEI channels have achieved meaningful diversification beyond lighting, with non-lighting measures, including those identified through CEI strategic energy management process, accounting for a substantial share of savings in those segments. As lighting markets approach saturation in future years, sustaining portfolio-wide savings will depend on broadening this kind of end-use diversity into smaller customer segments, particularly through expanded participation in HVAC, refrigeration, and controls. Building out contractor networks with expertise in these end uses is a logical near-term step toward that goal.

- **Recommendation 1:** To strengthen long-term program performance and reduce reliance on lighting-driven savings, the program should expand its development and promotion of non-lighting opportunities across both the SBS and SAGE channels. This should include (1) identifying and recruiting contractors that specialize in refrigeration services, HVAC controls, and building automation systems; (2) integrating these contractors into targeted outreach and project development efforts for small businesses, schools, government entities, and nonprofits; and (3) supporting the creation or refinement of measures and pathways aligned with these end uses. Enhancing contractor networks and sector-specific engagement will help diversify the measure mix, increase participation in HVAC and refrigeration opportunities, and position the program to maintain robust and sustainable savings as lighting markets continue to evolve.

Large C&I respondents generally reported sufficient support in completing the application or did not experience difficulty completing it independently. Of the five respondents who worked on the application, two reported receiving assistance from the utility or its implementation contractor, and two reported assistance from their own contractor. The respondent who completed the application independently reported that it was very easy to complete.

A substantial share of respondents reported that roles directly involved in program delivery, specifically OG&E representatives and contractors, influenced their decision to install energy-efficient equipment. Among respondents for whom an OG&E representative was applicable, more than half rated the representative's influence as a four or five, indicating that program staff guidance often contributed to project advancement. Contractors were involved in all projects, and nearly half of respondents rated contractor influence as a four or five, indicating that installers also influenced decision-making for many participants.

SBS assessments supported customer decision-making. The SBS respondent reported receiving a comprehensive assessment and having sufficient information to act on the recommended measures.

All SBS and Large C&I respondents reported satisfaction with the program. No respondents reported dissatisfaction, and most reported being very satisfied.

2.4.4 Progress on Previous Recommendations

This section provides an update on the status of previous recommendations the Evaluator has made during the same program cycle, per Protocol C of the AR TRM v10.0 (p. 25). All recommendations have been grouped into one of the following five categories:

- **Completed.** The recommendation has been fully implemented.
- **Continuing.** The recommendation has been fully implemented in the previous year. However, due to the nature of the recommendation, this will be an area will be monitored throughout the next program year.
- **In Progress.** Recommendations that have been accepted and will be adopted before the next program year.
- **Under Consideration.** Recommendations that are still under review by the program staff or implementers and no decision has yet been made.
- **Reviewed and Rejected.** Recommendations that are no longer applicable due to changes in program design or operations.

Table 2-14 summarizes the status of previously made recommendations.

TABLE 2-14 STATUS OF PREVIOUS RECOMMENDATIONS

PY	Program	Recommendation	Status	Response
2024	HEEP	LED Lamps (Retail Markdown): Implementation staff may consider incorporating non-residential impacts into retail markdown lighting by applying weighted hours of use and weighted CF values from relevant Small Business Solutions participating building types. A conservative approach is to apply the three-year average of the weighted hours and CF values the Evaluator applied in PY2022, PY2023, and PY2024: 1. Average weighted hours of use: 998 2. Average weighted CF: .14	Not Applicable	LED Lamps are no longer available in Retail markdown and are offered instead to income-eligible customers through Food Bank and community organizations.
2024	HEEP	Energy Assessments: Maintain communication with customers who sign up for an energy assessment. Some respondents reported concerns about wait times, so providing regular updates on their status in the queue may enhance participants' experiences.	Accepted	The program team maintained consistent communication with customers regarding potential wait times and scheduling. Program team provided multiple touchpoints throughout the process, including appointment scheduling, confirmation of service times, and reminders as the appointment date approached. Customers were also informed of technician arrival windows.
2024	HEEP	Central AC/HP Replacement: Implementation staff may consider incorporating a series of checks within program calculators to flag HVAC units for which installed unit SEER2 efficiencies are 15.2 or higher – the baseline efficiency EER2 value should be 9.8 for these units.	Accepted	Engineering has let us know that this recommendation has now been implemented into our calculator but was not implemented for the 2025 program year.
2024	CWA	Review contractor training to reinforce the importance of work quality and tidiness. - Work quality issues were noted by some of the survey respondents, and the number is sufficient to emphasize this in future contractor trainings. Addressing these issues should improve the customer experience and the reputation of the program.	Accepted	Program team implemented a probation system for trade allies who display quality issues. Program team also has updated training documentation and presentations to emphasize cleanliness and work quality, with added training during the kickoff. As well as, updated communication standards regarding these issues.

PY	Program	Recommendation	Status	Response
2024	CEEP	Focus on promotion of incentive awareness with participants. - Participant awareness of other incentives was somewhat limited. The program should focus on informing these participants of other incentive opportunities for the business to increase awareness of additional efficiency opportunities. Specific tactics include: • Flagging participants for post project follow up to discuss other energy saving opportunities. • Identifying other energy saving opportunities during post project quality control visits. • Develop a follow-up email or direct mail campaign for past participants, highlighting relevant additional incentives based on their completed project type. • Introduce contractor performance incentives or recognition for those who successfully refer participants to additional incentive programs. • Develop marketing materials that bundle incentives into logical upgrade paths (e.g., "Lighting + HVAC: Maximize Energy Savings with These Two Incentives").	Accepted	The Program team will be concentrating on educating the customer of all possible measures that can be incentivized throughout the initial energy audit/walk-through: lighting/air leaks/VFD's on motors/HVAC upgrades/etc. The team is looking forward to using the incentive check delivery as another chance to both recap the project in its entirety, as well as take the opportunity to explore other potential projects the customer may be considering as a result. The follow up of follow-up email or direct mail campaigns as well as contractor performance incentives will be taken into consideration as pipeline development is necessary (program goal thresholds are typically the limiting factor for marketing campaigns). Regarding the development of marketing materials that bundle incentives into logical upgrade paths, with the new addition of an internal AC Technician, the team will be concentrating on promoting the AC tunes throughout our SAGE program, as well as combining the opportunity for smart thermostat installations.

2.5 Comprehensiveness Checklist

This section outlines how the OG&E portfolio performed against the seven factors approved by the APSC with Order No. 17 in Docket No. 08-144-U on December 10, 2010.

The Evaluator reviewed the OG&E programs and portfolio to assess whether it followed the APSC Comprehensiveness Goals. In assessing these metrics, the Evaluator will score them on numerous subcomponents.

The scoring methodology is as follows:

- : Meets all requirements and is in full compliance with this performance indicator;
- ◐: Meets some requirements and is in partial compliance with this performance indicator;
- : Is not in compliance with this performance indicator; and
- NA: Performance indicator is not applicable to this program.

2.5.1 Factor One: Education, Training, Marketing, and Outreach

The Evaluator reviewed Factor 1 as three separate components: 1) education, 2) training, and 3) marketing and outreach. Education, training, marketing, and outreach activities are summarized below.

Education

- HEEP includes customer education through in-home assessments (Residential Solutions), school-based curriculum and kits (LivingWise®), and builder-focused outreach for Positive Energy Homes.
- CWA provides education during in-home audits and through contractor engagement, emphasizing health and safety alongside energy efficiency.
- CEEP offers tailored energy assessments and opportunity reviews for commercial customers, including benchmarking and CEI workshops for large accounts.

Training

- HEEP requires technical training for HVAC tune-up contractors (CoolSaver protocol), annual refreshers, and BPI certification for weatherization contractors.
- CWA mandates BPI certification for at least one member of each contractor team, with annual refresher courses and kickoff meetings.
- CEEP provides annual kickoff sessions and onboarding for trade allies and distributors, covering program requirements, incentive structures, and QA/QC protocols.

Marketing and Outreach

- HEEP: Multi-channel campaigns including email, bill inserts, postcards, paid search, Meta ads, and billboard advertising. Seasonal targeting (HVAC in warm months, weatherization in cool months). Community events (home shows, rodeos, back-to-school nights) and retail engagement through monthly visits and quarterly events.
- CWA: Marketing mirrors Residential Solutions, with contractor-led outreach supplemented by CLEAResult and OG&E coordination.
- CEEP: Primarily relationship-based outreach via account executives, community affairs managers, and implementer staff. No large-scale paid media; relies on direct engagement, trade ally marketing, and distributor point-of-sale materials for midstream incentives.

The scoring for customer education is in Table 2-15.

TABLE 2-15 ASSESSMENT OF CUSTOMER EDUCATION BY PROGRAM

Program	Provides Educational Materials	Outreach Through Multiple Channels	Education Targeted to Specific Market Barriers
Home Energy Efficiency Program	●	●	●
Consistent Weatherization Approach Program	●	●	●
Commercial Energy Efficiency Program	●	●	●

2.5.1.1 OG&E approached training in a comprehensive manner.

The Evaluator reviewed each program to assess whether:

- Whether the program is contractor-driven.
- If not, is it a program that could or should be contractor-driven.

- The program provides training classes to support their program offerings.

HEEP

- Full-day CoolSaver training for HVAC tune-ups, including written exam and in-field practical.
- Five shadowed visits required before independent work; annual refresher training mandatory.
- Weatherization contractors must have at least one BPI-certified team member; certifications verified annually.
- CLEAResult offers BPI training multiple times per year.
- Positive Energy Homes uses RESNET-certified HERS raters; QA protocols in place.

CWA

- Contractor-driven model with BPI certification required for at least one team member.
- Certifications renewed every three years; CLEAResult provides BPI training nationwide.
- Annual kickoff meetings include refresher training, safety reviews, and program updates.

CEEP

- Trade allies and distributors receive annual kickoff and onboarding sessions.
- Training covers program requirements, incentive structures, QA/QC processes, and use of online portals.
- Distributor training emphasizes correct application of midstream incentives and sales techniques.

TABLE 2-16 ASSESSMENT OF CONTRACTOR TRAINING

Program	Contractor Driven / Supported	Contractor Training Offered	Trade Allies Participate in Training
Home Energy Efficiency Program	Yes	●	●
Consistent Weatherization Approach Program	Yes	●	●
Commercial Energy Efficiency Program	Yes	●	●

2.5.1.2 OG&E approached marketing and outreach in a comprehensive manner

The Evaluator reviewed marketing and outreach strategies for each channel to determine whether they:

- Address participant barriers effectively;
- Engage trade allies where appropriate; and
- Target messaging to promote a comprehensive approach to energy efficiency.

After reviewing the materials and strategies:

- Most channels have marketing that addresses specific barriers (cost, awareness, complexity).
- OG&E and CLEAResult use diverse tactics: digital ads, bill inserts, community events, retail engagement, and trade ally support.
- Sector-specific outreach is evident in builder recruitment for PEH and account-rep engagement for C&I programs.

The table below summarizes the assessment.

TABLE 2-17 ASSESSMENT OF MARKETING & OUTREACH BY PROGRAM

Program/ Channel	Marketing Approach	Assessment
HEEP		
Residential Solutions	Multi-channel: email, postcards, bill inserts, community events, retail POP audits.	Appropriate: Broad outreach supports participation; seasonal targeting aligns with customer needs.
LivingWise® Schools Outreach	School-based: curriculum + kits; teacher webinars; parent engagement via students.	Appropriate: Educational goals align with delivery; broader marketing unnecessary.
HVAC Replacement & Tune-Up	Seasonal campaigns: email, postcards, bill inserts; contractor engagement.	Appropriate: Timed outreach addresses seasonal demand; contractor role is important.
Consumer Product Solutions (CPS)	Retail-focused: upstream markdowns, in-store visits, quarterly events, POP signage.	Appropriate: Retail engagement ensures visibility of discounts.
Positive Energy Homes (PEH)	Builder-centric: association outreach, event sponsorship, direct recruitment.	Appropriate: Targets decision-makers; marketing support for builders provided.
CWA		
Consistent Weatherization Approach (CWA)	Marketing is lead by program team, primarily OG&E outreach, but contractors also have a role.	Appropriate: Leverages contractor relationships. Use of email and mailers to make customers aware.
CEEP		
C&I Solutions (CEEP)	Relationship-driven: account executives, audits, technical assistance.	Appropriate: Direct engagement suits complex projects.
Small Business Solutions (CEEP)	Trade ally-driven: flyers, program guides, annual training sessions. Website and social media also promote availability of incentives	Appropriate: Contractor marketing is effective. Online presence supports awareness.
Midstream (CEEP)	Distributor-focused: POP materials, counter mats, annual staff training.	Appropriate: Supports point-of-sale incentives.
Continuous Energy Improvement (CEI)	Direct outreach: account executives; workshops for large customers.	Appropriate: Relationship-based approach fits behavioral/operational focus.

2.5.2 Factor Two: Budgetary, Management, and Program Delivery Resources

Whether the program and/or portfolio have adequate budgetary, management, and program delivery resources to plan, design, implement, oversee, and evaluate energy efficiency programs.

To evaluate budget and resource sufficiency, the Evaluator assessed performance indicators associated with the adequacy of budget allocations, the cost per kWh saved and whether program staff and contractor support was sufficient to support program goals. The Evaluator found that OG&E has achieved the Factor 2 objectives.

2.5.2.1 Program budgets were sufficient to implement the programs.

The portfolio exceeded its net energy savings (kWh) goal (27,149,446 kWh) by 13.4%, while spending 88% of its allocated budget, at an overall cost of \$0.29/net kWh (levelized cost of \$0.034 per kWh). All programs stayed within budget. OG&E's resource acquisition cost at a portfolio level is in line with averages for utilities across the country with programs that have been run for several years.¹⁰

Program and implementation staff reported that they had sufficient budget to cover program implementation. Table 2-18 shows the spending and energy savings (kWh) percentages for each program, along with the cost per kWh of savings.

TABLE 2-18 BUDGET ALLOCATION AND PROGRAM GOAL ATTAINMENT

Program	Spending (Percentage of Budget)	Energy Savings (Percentage of Net kWh Goal)	Levelized Cost per Net kWh
HEEP	79.7%	114.3%	\$0.040
CWA	91.9%	93.2%	\$0.053
CEEP	88.7%	119.5%	\$0.022
Regulatory	0.0%	0.0%	\$0.000
Planning	0.0%	0.0%	\$0.000
Total	87.9%	113.4%	\$0.034
Sums may differ due to rounding.			

2.5.2.2 Program staffing was sufficient for effective program management and timely delivery of resources.

Both OG&E and the implementation contractor reported that staffing levels were adequate to ensure effective program management and timely delivery of resources. Interviews highlighted a strong collaborative environment built over years of partnership, which supports consistent achievement of savings goals. Additionally, coordination is structured and frequent – bi-monthly in-person meetings between OG&E and the implementer cover all aspects of the portfolio.

Table 2-19 outlines the acquisition costs for the portfolio.

¹⁰ EPA estimates that energy efficiency programs will cost program administrators \$0.58 cents up front per kWh saved in the first year for low savings levels, with costs declining to \$0.46 and then \$0.35 cents as programs ramp up. Source: <http://aceee.org/sites/default/files/cost-of-ee.pdf>

TABLE 2-19 ACQUISITION COSTS & GOAL ATTAINMENT

Program	Budgeted Spend	Actual Spend	Budget \$ per Net kWh	Actual \$ per Net kWh	Net kWh Savings Goal	Net kWh Savings
HEEP	\$1,438,883	\$1,147,021	\$0.46	\$0.37	2,721,723	3,137,794
CWA	\$3,546,961	\$3,259,924	\$0.66	\$0.60	5,784,547	5,391,044
CEEP	\$5,227,490	\$4,636,428	\$0.23	\$0.21	18,643,176	22,278,177
Regulatory	\$0	\$0	\$0.00	\$0.00	0	0
Planning	\$70,000	\$0	\$0.00	\$0.00	0	0
Total	\$10,283,334	\$9,043,374	\$0.33	\$0.29	27,149,446	30,807,015
Sums may differ due to rounding.						

The Factor Two scoring for each program is presented in Table 2-20.

TABLE 2-20 ASSESSMENT OF BUDGETARY, MANAGEMENT, AND RESOURCES BY PROGRAM

Program	Budget is Sufficient to Support Program Goals	Cost per-kWh Aligns with Program Plan	Program Has Sufficient Staffing	Program Has Sufficient Contractor Support
Home Energy Efficiency Program	●	●	●	●
Consistent Weatherization Approach Program	●	●	●	●
Commercial Energy Efficiency Program	●	●	●	●

2.5.3 Factor Three: Major End-Uses Addressed

To assess Comprehensiveness Checklist Factor 3, the Evaluator identified the end-uses addressed by each program. OG&E designed its portfolio to provide customers with options that cover a broad set of energy-saving opportunities. The Home Energy Efficiency Program and Consistent Weatherization Approach Program supported comprehensive projects aimed at deeper kWh savings. OG&E also coordinated with gas utilities to share incentive costs for HVAC and water heating measures for shared customers.

The Evaluator concluded that OG&E continued to meet the objectives of Factor 3. All major end-uses defined in the AR TRM v10.0 were represented in the residential program.

- Residential savings were concentrated in two areas. HVAC measures produced 50% of total residential kWh savings, and envelope measures produced 33%. The remaining savings came from appliances (9%), lighting (5%), hot water (2%) and finally the HERS modeling (< 2%).
- Commercial savings were led by lighting at 46%, industrial process measures at 36%, followed by CEI at 17%. The remaining savings came from HVAC at 1%, and refrigeration at less than 1%.

Table 2-21 shows different levels of multi-end-use adoption across programs. Most HEEP participants installed measures across multiple end-uses, with 55.8% completing multi-end-use projects. CWA participants also installed multi-end-use measures at a high rate (69.3%). CEEP participants primarily installed single end-use measures (92.9%), which aligns with the program structure.

TABLE 2-21 INSTALLATION OF MULTIPLE END-USE PROJECTS

Program	On-site Assessment and/or Diverse Direct Install Measures Offered	Single End Use (% of installations)	Multiple End Use (% of installations)
Home Energy Efficiency Program	Yes	44.2%	55.8%
Consistent Weatherization Approach Program	Yes	30.7%	69.3%
Commercial Energy Efficiency Program	Yes	92.9%	7.1%
Total		18.7%	81.3%

*Measures were grouped into the following end-uses: Appliance, HVAC, plug load, water heating, lighting, envelope, refrigeration, C&I kitchen, compressed air, CEI, and industrial process.

The factor three scoring for each program is in Table 2-22. The Evaluator identified the end-uses served by each of the OG&E programs. Most OG&E programs are designed around a specific technology or end-use.

TABLE 2-22 ASSESSMENT OF END-USES ADDRESSED BY PROGRAM

Program	HVAC	Hot Water	Food Service	Building Envelope	Industrial Process	Behavioral
HEEP	●	●	NA	●	NA	○
CWA	●	●	NA	●	NA	○
CEEP	●	●	○	●	●	●

2.5.4 Factor Four: Comprehensively Address Customer Needs

To assess Factor 4, the Evaluator examined the extent to which OG&E programs provide technical assistance and whether the information offered is comprehensive for promoting energy efficiency.

HEEP

- Residential channels offer technical support through in-home energy assessments (Residential Solutions), builder guidance for Positive Energy Homes, and program-trained contractor-led HVAC tune-ups.
- Retail-focused channels (CPS) provide point-of-purchase materials and in-store education for customers and staff.

Consistent Weatherization Approach (CWA)

- Delivers comprehensive in-home audits and technical guidance for implementing whole-home efficiency upgrades.
- Contractors provide detailed recommendations during audits, supported by program protocols and performance thresholds for duct and air sealing.

Commercial Energy Efficiency Program (CEEP)

- Offers robust technical assistance through facility audits, opportunity reviews, and engineering support for custom projects.
- Continuous Energy Improvement (CEI) includes workshops and ongoing guidance for operational and behavioral changes, supported by benchmarking tools.
- Midstream and Small Business Solutions channels provide distributor and trade ally training to ensure accurate application of incentives and measure specifications.

Overall, OG&E programs demonstrate strong technical assistance capabilities, particularly for comprehensive projects such as weatherization and large C&I custom measures. Information provided to participants is designed to support decision-making.

The program incentive design elements can be summarized across three areas:

- Bundled incentives: Residential solutions bundles direct install incentives; this is reflected under CWA.
- Tiered incentives: Tiered incentives appear across programs where higher efficiency or higher savings lead to higher rebates: CWA (insulation, air, and duct sealing levels), HEEP (AC replacement tiers), and CEEP (incentives based on energy savings).
- Contractor incentives: HEEP includes contractor incentives for premium efficiency in duct and envelope sealing. The table also reflects contractor incentives for CEEP; none are indicated for CWA.

TABLE 2-23 ASSESSMENT OF PROJECT COMPREHENSIVENESS BY PROGRAM

Program	Technical Assistance and/or Audits	Information Provided Comprehensive for Efficiency	Bundled Incentives for Multiple Measures	Tiered Incentives for Premium Efficiency	Contractor Incentives for Premium Efficiency
HEEP	●	●	●	●	●
CWA	●	●	●	●	●
CEEP	●	●	●	●	●

2.5.5 Factor Five: Targeting Market Sectors & Leveraging Opportunities

The Evaluator reviewed whether the OG&E portfolio offered a comprehensive range of energy efficiency opportunities to all major customer sectors. Table 2-24 summarizes the market sectors and what programs target or allow each sector.

TABLE 2-24 ASSESSMENT OF TARGETED CUSTOMER SECTORS BY PROGRAM

Program	Residential	Multifamily	Mobile Home	Small Commercial	Large Commercial	Industrial	Agricultural	Public Sector
HEEP	●	●	●	N/A	N/A	N/A	N/A	N/A
CWA	●	●	●	N/A	N/A	N/A	N/A	N/A
CEEP	N/A	N/A	N/A	●	●	●	○	●

OG&E's portfolio includes multiple programs designed to serve a broad range of customer segments, with at least one program targeting each major sector. However, the agricultural sector is not directly targeted by prescriptive rebate programs due to the specialized nature of equipment, which typically requires custom calculations. Participation would primarily be through custom projects under C&I Solutions.

Based on the summary, OG&E demonstrates collaboration through:

- **Joint Implementation:** OG&E and AOG jointly sponsor the Consistent Weatherization Approach, sharing costs for weatherization measures and coordinating delivery.
- **Marketing Partnerships:** Community-based outreach includes participation in local events (home and garden shows) and engagement with nonprofits and chambers of commerce.
- **Retail Partnerships:** Consumer Product Solutions leverages relationships with major retailers (Lowe's, Home Depot, Dollar General) and nonprofit outlets (Habitat ReStores) for upstream incentives and in-store education.
- **Industry Engagement:** Positive Energy Homes recruits builders through homebuilder associations and industry events, providing marketing support for participating builders.

2.5.6 Factor Six: Cost-effectiveness

Whether the programs and/or portfolio enable the delivery of all achievable, cost-effective energy efficiency within a reasonable period and maximize net benefits to customers and the utility system.

To evaluate Factor 6, the Evaluator assessed three key performance indicators: 1) whether programs achieved their Plan goals, 2) NTG values and 3) program cost-effectiveness.

2.5.6.1 Goal Achievement

Both the HEEP (115.3%) and the CEEP (119.5%) achieved their net energy (kWh) savings goals, while the CWA (93.2%) program fell just short of its net kWh goal. In PY2025, the portfolio exceeded its net energy savings (kWh) goal by 13.5%. This is the second year in the triennial cycle in which the portfolio exceeded its net savings goal, as in PY2024 the portfolio exceeded its goal by 16%.

2.5.6.2 Cost-Effectiveness

Table 2-25 presents program and portfolio level NTG and benefit/cost ratios for each test. The UCT¹¹ and PCT results were particularly relevant to Comprehensiveness Factor 6, as these test results indicate that portfolio benefits exceeded its costs from the utility and customers' perspectives, respectively.

TABLE 2-25 NTG AND COST-EFFECTIVENESS RESULTS

Program	Net kWh Savings (kWh)	NTG	TRC	UCT	RIM	PCT
HEEP	3,137,794	97.7%	1.75	1.64	0.45	5.57
CWA	5,391,044	97.3%	1.35	1.40	0.48	3.65
CEEP	22,278,177	96.0%	2.40	2.23	0.46	11.80
Regulatory	0	0.0%	0.00	0.00	0.00	0.00
Planning	0	0.0%	0.00	0.00	0.00	0.00
Total	30,807,015	96.4%	1.86	1.85	0.46	6.45
Sums may differ due to rounding.						

¹¹ The UCT is, in some cases, also referred to as the Program Administrator Cost Test (PACT).

Table 2-26 outlines the scoring for Factor Six. For “Met Net Savings Goal”, a half Harvey Ball was assigned if the program achieved more than 80% of the net energy savings (kWh) goal. An empty Harvey Ball was assigned if the program achieved less than 80% of the net energy savings (kWh) goal.

TABLE 2-26 ASSESSMENT OF COST-EFFECTIVENESS

Program	NTG Ratio Within Industry Norms	Met Net Savings Goal	Program TRC
HEEP	●	●	●
CWA	●	◐	●
CEEP	●	●	●

2.5.7 Factor Seven: EM&V Procedures

The Evaluator conducted a review of EM&V procedures by program:

- Quality Assurance and Quality Control (QA/QC) and EM&V procedures by program staff;
- QA/QC and EM&V procedures by third-party implementation staff (where applicable)
- QA/QC and EM&V procedures by the Evaluator.

The EM&V of the OG&E programs incorporated industry best practices and was conducted in an iterative process that incorporated feedback from OG&E and implementation contractors as well as the Independent Evaluation Monitor (IEM). The Evaluator developed EM&V plans that corresponded to protocols set out in the AR TRM v10.0.

Finally, the Evaluator reviewed the quality of program tracking data in order to assess whether the data allowed for complete evaluation. Further, the Evaluator reviewed the extent to which individual savings calculations were performed using facility-specific inputs into the AR TRM v10.0 algorithms versus the use of simplifying assumptions Table 2-27. The results of the review are summarized in

TABLE 2-27 ASSESSMENT OF DATA & QA/QC PROCEDURES BY PROGRAM

Program	Tracking Contains Necessary Fields	Savings Calculations Performed and Reported	Savings Calculations Based on Facility Data	QA/QC Inspections by Program Staff
HEEP	●	●	●	●
CWA	●	●	●	●
CEEP	●	●	●	●

Findings of this review included:

- Measure specific inputs that are required for accurate savings calculations were sometimes missing from the CWA and HEEP tracking data. In such cases, the Evaluator requested the missing information from CLEAResult. Missing information included:
 - Existing thermostat that was replaced by smart thermostat
 - HVAC tonnages for homes that had duct sealings
 - Heating / cooling types in homes
 - Make and model numbers for rebated appliances
 - Assumed baseline and efficient wattages for LED lamps
- The Evaluator aggregated measures for which the tracking data did not have the required inputs and summarized a data request in an Excel workbook. CLEAResult was able to provide the requested information in a timely manner.

Additionally, the Evaluator discussed specific data needs for a variety of measures offered through the CEEP, as is the case with larger custom commercial projects. Through a collaborative effort, the Evaluator and Implementer worked to reach an understanding on project documentation and input assumptions required to calculate energy savings.

3 Evaluation Methodology

The following subsections provide an overview of both the impact and process evaluations for each program in the demand portfolio.

3.1 Impact Evaluation

3.1.1 Gross Impact

The Evaluator approach to savings analysis depends largely on the types of measures installed.

In the following subsections gross savings calculation methodologies are detailed by measure category, as is appropriate.

3.1.1.1 Arkansas TRM v10.0 Algorithms and Inputs

Deemed savings values and algorithms from the AR TRM v10.0¹² were used to determine verified ex-post gross energy (kWh) and demand (kW) impacts except as noted in Section 3.1.1.3. Care was taken to ensure any assumptions were reasonable and current, and that there were no errors in the algorithms. For each measure in the program, total ex-post gross energy (kWh) and demand (kW) were determined as a product of the number of measures verified as qualifying for an incentive and the deemed or partially deemed savings per measure.

3.1.1.2 Energy Savings (kWh) Calculations

The following sections outline the impact evaluation approach for each program. For equipment and retrofits incentivized through the program, calculation methodologies were performed as described in the AR TRM v10.0. The table below identifies the sections that were used for verification of measure-level savings.

The gross impact evaluation effort included the following:

- **Desk Reviews.** The Evaluator utilized the AR TRM v10.0 values in assessing ex-post gross energy savings (kWh) and NEB from the measures. In addition, the Evaluator also examined Excel workbooks and supplemental documentation used by the third-party implementor staff (CLEAResult) to assess savings by measure. The workbook utilizes savings algorithms with Contractor inputs to calculate savings based on the measure and input parameters.
- **Data Tracking Review:** For all channels, project data from the implementers was reviewed to ensure that tracking systems followed Protocol A, B1 and B2 of the AR TRM v10.0.
- **Site Visits.** The Evaluator performed site visits in PY2025.
 - **Residential Solutions channel:** 30 total site visits.
 - **Weatherization component:** 27 total site visits.
 - **Low-Income Weatherization component:** 14 total site visits.

See Table 3-1 for the list of measures and their associated AR TRM v10.0 sections.

¹² Ibid, 1.

TABLE 3-1 AR TRM v10.0 SECTIONS BY MEASURE TYPE

Measure Category	Measure	Subsection(s)
Appliances	Advanced Power Strip	2.6.1
	ENERGY STAR® Window	2.2.7
	ENERGY STAR® Pool Pump	2.6.2
	ENERGY STAR® Room Air Purifier	2.4.5
	ENERGY STAR® Dehumidifier	2.4.4
	Bathroom Ventilation Fan	2.1.13
Domestic Hot Water	Faucet Aerator	2.3.4
	Low-Flow Showerhead	2.3.5
Envelope	Air Infiltration	2.2.9
	Ceiling Insulation	2.2.2
	Wall Insulation	2.2.3
HVAC	Duct Sealing	2.1.11
	Central Air Conditioner (AC) Replacement	2.1.6
	Central Heat Pump (HP) Replacement	2.1.8
	Smart Thermostat	2.1.12
	Window AC Replacement	2.1.10
Lighting	LED Lamp (Specialty)	2.5.1
	LED Lamp (Standard)	2.5.2

3.1.1.3 Diversions from the AR TRM v10.0

This section outlines the instances in which the Evaluator deviated from the AR TRM v10.0 in PY2025.

TABLE 3-2 DIVERSIONS FROM AR TRM SUMMARY

Channel	Measure	Reference Source	Reference Section
Residential HVAC	Central AC / HP Tune-up	PY2025 CoolSaver M&V Plan	N/A
Consumer Products	Water Cooler	New Orleans TRM v8.0	Section 1.1.4
Positive Energy Homes	HERS	Ekotrope Modeling	IECC 2009
Low-Income Weatherization	Outlet Gasket (Kit)	Illinois TRM v13.0	Section 5.6.1
Low-Income Weatherization	Weather Stripping (Kit)	Illinois TRM v13.0	Section 5.6.1
Commercial HVAC	Central AC / HP Tune-up	PY2025 CoolSaver M&V Plan	N/A
Commercial Midstream	Midstream Lighting	Historic average assumptions based on past channel participation	N/A
Commercial	Custom Measure	Custom approaches	N/A

3.1.1.4 Tracking System Review

The impact evaluation began with a review of program tracking data. The tracking data included a separate row for each measure installed. Every premise in the program had a unique incentive identifier, so each premise had multiple rows to reflect the different measures completed.

3.1.1.5 CoolSaver Tune-up

CoolSaver tune-ups were provided by a qualified technician and involve testing the performance of the unit before and after measures are implemented. Typical measures implemented as part of the tune-up procedure include air flow correction; cleaning of the indoor blower, evaporator coils, condenser coils; and correction of refrigerant charge.

Evaluation of the program is based on the CoolSaver PY2025 M&V Plan provided by CLEAResult. The Evaluator examined the Excel workbook containing a census of program participants to assess savings by measure. The workbook provided contains data exported from the program tracking tool. The Evaluator examined the data and recreated the overall savings calculations. Savings from AC and heat pump tune-ups were based on AR TRM v10.0 deemed equivalent full-load hours along with unit-specific capacity and deemed efficiency loss recovered due to work performed in accordance with the program.

3.1.1.6 Site Visits

For CEEP, the Evaluator verified 28 samples projects accounting for 81% of the total claimed savings. The sample frame, developed on a project level basis meets the criteria of 90% confidence and $\pm 10\%$ precision at the program level.

For the residential portion of the portfolio, the Evaluator completed site visits to verify measures that were installed / performed in the channels. In PY2025, site visits were conducted in 71 residential homes. Among these, 41 were Arkansas Oklahoma Gas (AOG) dual-fuel homes. Compared to PY2024, the Evaluator completed verification work in a total of 80 residential homes and included 38 Arkansas Oklahoma Gas (AOG) dual-fuel homes. The table below shows a site visit comparison between PY2024 and PY2025.

TABLE 3-3 RESIDENTIAL SITE VISIT SUMMARY BY PROGRAM YEAR

Channel / Metric	PY2024	PY2025
CWA	28	27
LI Wx	37	14
RSOL	3	30
HVAC	12	0
Arkansas Oklahoma Gas (AOG) Homes	38	41
Total	80	71
Sums reflect the number of homes that were visited in each program year.		

Overall, the Evaluator executed site visits between August 2025 and November 2025. More specifically, the site visits were completed in three different timeframes in mid-August, early and mid-September, and early November 2025.

The primary goal of these site visits was to verify the installation and accuracy of information collected on the application, with an emphasis on achieving 90% confidence and 10% precision. A random sampling process, with a focus on high-impact measures (HIM), determined the selected sites.

In total, the Evaluator verified 284 sampled total project quantities completed in 71 sites. The sample frame, developed on a measure-level basis for HIM (including advanced power strips, air infiltration, ceiling insulation, duct sealing, air purifiers, windows, faucet aerators, LED lamps, low-flow showerheads, and smart thermostats), meets the criteria of 90% confidence and $\pm 10\%$ precision at the program level. More precisely, the actual precision achieved is $\pm 8.45\%$.

Additional details can be found in Section 2.1.1.

These site visit impacts, in some cases, were triangulated with results from previous years in the same planning period (e.g., in this case, PY2024) or literature review results. Literature review results are found in the following section.

See additional site visit notes in Appendix E Residential Site Visit Findings.

3.1.1.7 Residential Program In-Service Rates

3.1.1.7.1 LITERATURE REVIEWS FOR MEASURE IN-SERVICE RATES

Literature reviews were performed to evaluate gross impacts of measures that were not identified during site visits or had low samples. In cases where there are small samples, the literature review may be averaged with the site visit impact. Summaries of the measure-specific literature review findings are provided in the following tables.

TABLE 3-4 ADVANCED POWER STRIPS LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
2023 CPS Energy TRM	CPS Energy, TX	SF Smart Strip	DI in Wx	100.0%
2022 Hawaii TRM	NA	Advanced Power Strips	DI in SF	100.0%
IL TRM V11.0	NA	Advanced Power Strips	DI in SF	100.0%
MO Ameren PY21 EM&V	NA	Advanced Power Strips	DI in SF	95.0%
PY23 EM&V Report	SWEPCO AR	Advanced Power Strips	DI in SF	93.5%
Average ISR				97.7%

TABLE 3-5 AIR INFILTRATION LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY2022 EM&V Report	Connecticut	Air Infiltration	TA Installed	92.0%
PY2023 EM&V Report	SWEPCO AR	Air Infiltration	TA Installed	95.4%
PY2023 EM&V Report	OG&E AR	Air Infiltration	TA Installed	98.0%
IL V11.0 TRM	NA	Air Infiltration	TA DI	100.0%
Average ISR				96.1%

TABLE 3-6 AIR PURIFIER LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
MA 2021 eTRM	NA	Room Air Cleaners	Not Specific	97.0%
RI 2021 TRM	NA	Room Air Cleaners	Not Specific	97.0%
PY2021 EM&V Report	Entergy, AR	SF Appliances	DI in SF	78.2%
PY2021 EM&V Report	OG&E AR	Air Purifiers	Rebate	100.0%
PY2018 EM&V Report	RMP Utah	Appliances in SF	Rebate	100.0%
PY2021 EM&V Report	SWEP CO AR	Air Purifier	DI in Wx	92.9%
Average ISR				94.2%

TABLE 3-7 CEILING INSULATION LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY21 EM&V Report	Entergy, AR	SF Envelope	TA Installed	100.0%
PY21 EM&V Report	Entergy, AR	MF Envelope	TA Installed	100.0%
PY18 EM&V Report	RMP Utah	Envelope Wx	TA Installed	100.0%
PY23 EM&V Report	OG&E AR	Ceiling Insulation	TA installed	97.0%
PY8 (2022) EM&V Report	SWEP CO LA	Ceiling Insulation	TA installed	100.0%
Average ISR				99.4%

TABLE 3-8 CENTRAL AC REPLACEMENT LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY11 EM&V Report	Entergy NO	AC Replacement	TA Installed	100.0%
PY21 EM&V Report	OG&E AR	AC Replacement	TA Installed	100.0%
PY21 EM&V Report	SWEP CO AR	AC Replacement	TA Installed	100.0%
2021 Rhode Island TRM	NA	Air Conditioning	TA Installed	100.0%
CT V20.0 TRM	NA	Window AC	Rebate	100.0%
Average ISR				100.0%

TABLE 3-9 CENTRAL HP REPLACEMENT LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY9 EM&V Report	SWEP CO LA	HP Replacement	TA Installed	100.0%
PY23 EM&V Report	OG&E AR	HP Replacement	TA Installed	100.0%
PY21 EM&V Report	SWEP CO AR	HP Replacement	TA Installed	100.0%
2023 Rhode Island TRM	NA	Central Heat Pump	TA Installed	100.0%
Average ISR				100.0%

TABLE 3-10 DUCT SEALING LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY21 EM&V Report	SWEP CO AR	Duct Sealing	TA Installed	99.7%
PY21 EM&V Report	OG&E AR	Duct Sealing	TA Installed	100.0%
PY11 EM&V Report	Entergy NO	Duct Sealing	TA Installed	94.4%

2021 Rhode Island TRM	NA	Duct Sealing	Not Specific	100.0%
Average ISR				98.5%

TABLE 3-11 FAUCET AERATOR LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY21 EM&V Report	Entergy, AR	MF DHW	TA Installed	100.0%
IL TRM V11.0	NA	Aerator	DI ISR	93.0%
New Orleans TRM 7.0	NA	Aerator	DI ISR	98.0%
IA TRM V7.0	NA	Aerator	DI ISR	95.0%
PY23 EM&V Report	OG&E AR	Aerator	TA installed	100.0%
Average ISR				97.2%

TABLE 3-12 LED LAMP LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY9 (2023) EM&V Report	SWEPSCO LA	LED Lamp	TA Installed	100.0%
2023 CPS Energy (TX) TRM	CPS Energy	LED Lamp	Not Specific	97.0%
AR TRM V9.2	NA	LED Lamp	Not Specific	97.0%
PY23 EM&V Report	OG&E AR	LED Lamp	DI in Wx	100.0%
Hawaii TRM PY2022	NA	LED Lamp	Not specific	97.0%
Average ISR				98.2%

TABLE 3-13 LOW-FLOW SHOWERHEADS LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY21 EM&V Report	Entergy, AR	MF DHW	TA Installed	100.0%
2022 Hawaii TRM	NA	Showerheads	DI ISR	93.0%
IL TRM V11.0	NA	Showerheads	DI ISR	96.0%
New Orleans TRM 7.0	ENO	Showerheads	DI ISR	98.0%
IA TRM V7.0	NA	Showerheads	DI ISR	98.0%
PY2023 EM&V Report	OG&E AR	Showerheads	TA installed	100.0%
Average ISR				97.5%

TABLE 3-14 POOL PUMP LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
PY21 EM&V Report	DTE	Pool Pump	Rebate	85.0%
PY10 EM&V Report	Entergy NO	Pool Pump	Rebate	100.0%
2021 Rhode Island TRM	NA	Pool Pump	Rebate	100.0%
Average ISR				95.0%

TABLE 3-15 SCHOOL KITS – MIXED MEASURES LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
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IL V11.0TRM	NA	Wx School Kit	Schools	58.0%
IL V11.0TRM	NA	School EE Kit	Schools	83.8%
Iowa V7.0 TRM	NA	School EE Kit	Schools	60.0%
Ameren MO PY21 TRM V2.0	NA	School EE Kit	Schools	90.0%
Average ISR				73.0%

TABLE 3-16 SMART THERMOSTAT LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
2022 Hawaii TRM	NA	Smart thermostat	Not Specific	90.0%
PY22 EM&V Report	OG&E AR	Smart thermostat	TA Installed	100.0%
PY21 EM&V Report	SWEPCO AR	Smart thermostat	TA Installed	100.0%
2023 Rhode Island TRM	NA	Smart thermostat	Not Specific	100.0%
PY2022 EM&V Report	Black Hills, CO	Smart thermostat	Not specific	100.0%
Average ISR				98.0%

TABLE 3-17 NEW HOME (WHOLE HOME) LITERATURE REVIEW RESULT

Source	Utility	Measure Name	Delivery Mechanism	In-Service Rate
2019 DSM EM&V Report	NIPSO	Whole House NC	Builder	72.0%
2021 EM&V Report	PSO	Whole House NC	Builder	100.0%
PY22 EM&V Report	OG&E	Whole House NC	Builder	104.3%
2018 EM&V Report Volume I of II	I&M	Whole House NC	Builder	114.0%
2023 Rhode Island TRM		Whole House NC	Builder	99.2%
Average ISR				97.9%

3.1.1.7.2 IN-SERVICE RATES APPLIED

The tables below summarize the in-service rates (ISR) which were applied in each residential desk review. The rates are a combination of participant surveys, site visits, literature reviews, and ISR values from previous evaluations years. There may be measures for which there were no site visits or survey results for this year, however, the ISRs are based on site visits, surveys, and literature review results from previous years.

TABLE 3-18 IN-SERVICE RATES FOR CWA

CWA Measure	Participant Survey ISR	Site Visit ISR	Lit Review ISR	PY2024 ISR	PY2025 ISR
Total	NA	27 On-sites			
Advanced Power Strip	NA	50.0%	NA	99.1%	99.1%
Air Infiltration	NA	110.2%	NA	103.8%	107.0%
Ceiling Insulation	NA	100.0%	NA	99.8%	99.9%
Duct Sealing	NA	91.9%	NA	99.6%	95.7%
Faucet Aerator	NA	NA	97.2%	99.3%	99.3%
LED Lamp (Specialty)	NA	100.0%	NA	98.1%	99.0%
LED Lamp (Standard)	NA	100.0%	97.5%	98.1%	99.0%
Low-Flow Showerhead	NA	NA	NA	99.4%	99.4%
Smart Thermostat	NA	100.0%		99.0%	99.5%
Wall Insulation	NA	NA		99.4%	99.4%

TABLE 3-19 RATES AND IMPACTS FOR LI Wx

LI Wx Measure	Participant Survey ISR	Site Visit ISR	Lit Review ISR	PY2024 ISR	PY2025 ISR
Total	NA	14 On-sites			
Advanced Power Strip	NA	NA	NA	90.4%	90.4%
Air Infiltration	NA	110.2%	NA	103.1%	106.7%
Ceiling Insulation	NA	100.0%	NA	99.8%	99.9%
Duct Sealing	NA	102.8%	NA	100.8%	101.8%
Faucet Aerator	NA	NA	NA	99.3%	99.3%
LED Lamp (Specialty)	NA	100.0%	NA	95.5%	97.8%
LED Lamp (Standard)	NA	100.0%	NA	95.5%	97.8%
LED Lamp (Standard) (Kit)	NA	NA	97.0%	NA	97.0%
Low-Flow Showerhead	NA	NA	NA	99.4%	99.4%
Outlet Gasket (Kit)	NA	NA	40.0%	NA	40.0%
Smart Thermostat	NA	100.0%	NA	99.0%	99.5%
Weather Stripping (Kit)	NA	NA	63.0%	NA	63.0%

TABLE 3-20 RATES AND IMPACTS FOR RSOL

RSOL Measure	Participant Survey ISR	Site Visit ISR	Lit Review ISR	PY2024 ISR	PY2025 ISR
Total	NA	30 On-sites			
Advanced Power Strip	NA	NA	NA	90.5%	90.5%
Advanced Power Strip (MF)	NA	66.7%	97.7%	95.4%	86.6%
Air Infiltration (MF)	NA	99.2%	NA	101.6%	100.4%
Ceiling Insulation	NA	NA	NA	99.7%	99.7%
Duct Sealing	NA	NA	NA	97.8%	97.8%
Duct Sealing (MF)	NA	101.0%	NA	98.8%	99.9%
Faucet Aerator (MF)	NA	100.0%	NA	98.6%	99.3%
LED Lamp (MF) (Standard)	NA	100.0%	NA	97.4%	98.7%
LED Lamp (Standard)	NA	100.0%	NA	99.4%	99.7%
Low-Flow Showerhead (MF)	NA	86.7%	NA	94.8%	90.7%
Pool Pump	NA	NA	NA	98.8%	98.8%
Wall Insulation	NA	NA	NA	99.4%	99.4%
Window	NA	NA	NA	99.8%	99.8%

TABLE 3-21 RATES AND IMPACTS FOR HVAC

HVAC Measure	Participant Survey ISR	Site Visit ISR	Lit Review ISR	PY2024 ISR	PY2025 ISR
Total	NA	NA			
Central AC Replacement	NA	NA	NA	100.0%	100.0%
Central AC Replacement (MF)	NA	NA	NA	100.0%	100.0%
Central AC Tune-up	NA	NA	NA	100.0%	100.0%
Central AC Tune-up (MF)	NA	NA	NA	100.0%	100.0%
Central HP Replacement	NA	NA	NA	100.0%	100.0%
Central HP Replacement (MF)	NA	NA	NA	100.0%	100.0%
Central HP Tune-up	NA	NA	NA	100.0%	100.0%
Central HP Tune-up (MF)	NA	NA	NA	100.0%	100.0%

TABLE 3-22 RATES AND IMPACTS FOR PEH - NEW CONSTRUCTION

PEH Measure	Participant Survey ISR	Site Visit ISR	Lit Review ISR	PY2024 ISR	PY2025 ISR
Total	NA	NA			
Advanced Power Strip	NA	NA	97.9%	NA	97.9%
Clothes Dryer	NA	NA	97.9%	NA	97.9%
Clothes Washer	NA	NA	97.9%	NA	97.9%
Dishwasher	NA	NA	97.9%	NA	97.9%
Refrigerator	NA	NA	97.9%	NA	97.9%
Smart Thermostat	NA	NA	97.9%	NA	97.9%
Ventilation Fan	NA	NA	97.9%	NA	97.9%
[All Measures]	NA	NA	97.9%	NA	97.9%

3.1.2 Net Impact

This section discusses the approaches used to estimate net savings for the residential and commercial programs separately.

3.1.2.1 Residential Programs

This section covers the net savings approach for the HEEP and CWA Program.

3.1.2.1.1 OVERALL APPROACH AND DATA COLLECTION

Table 3-23 summarizes the net savings approach used for each of the program channels and components.

TABLE 3-23 SUMMARY OF PROGRAM NET SAVINGS APPROACHES

Channel/Component	Net Savings Approach
HEEP: Consumer Products	Applied PY2023/PY2024 value
HEEP: RSOL (Single Family)	Applied PY2023/PY2024 value
HEEP: RSOL (Multifamily)	Applied PY2023
HEEP: Schools Outreach	Literature review
HEEP: Positive Energy Homes	Builder survey
CWA: CWA	Applied PY2023
CWA: Low Income Weatherization	Deemed NTG 1.0

Table 3-24 summarizes net-to-gross ratios from prior research and deemed values that were used to estimate the HEEP and CWA net savings.

TABLE 3-24 NET-TO-GROSS RATIOS FOR HEEP AND CWA

Channel	Measure	Free-Ridership	Spillover	NTG Ratio
HEEP Consumer Products	Advanced Power Strip	11%	2%	92%
	Air Purifier	19%	3%	85%
	Dehumidifier	28%	2%	80%
	Smart Thermostat	22%	2%	80%
	Ventilation Fan	34%	3%	69%
	Water Cooler	33%	3%	70%
	Upstream lighting: LI	0%	0%	100%
HEEP RSOL (Single Family)	Advanced Power Strips	0%	0%	100%
	Air Infiltration	0%	0%	100%
	Ceiling Insulation	0%	0%	100%
	Duct Sealing	0%	0%	100%
	ES Pool Pumps	22%	0%	78%
	ES Windows	0%	0%	100%
	Faucet Aerators	0%	0%	100%
	LEDs (Standard)	0%	0%	100%
	Low-Flow Showerheads	0%	0%	100%
	AC Replacement	0%	0%	100%
	HP Replacement	0%	0%	100%
	AC Tune up	0%	0%	90%

Channel	Measure	Free-Ridership	Spillover	NTG Ratio
HEEP RSOL (Multifamily)	Advanced Power Strip (MF)	0%	0%	100%
	Air Infiltration (MF)	0%	0%	100%
	Duct Sealing (MF)	0%	0%	100%
	Faucet Aerator (MF)	0%	0%	100%
	LED Lamp (MF) (Standard)	0%	0%	100%
	Low-Flow Showerhead (MF)	0%	0%	100%
	AC Replacement	19%	0%	81%
	HP Replacement	26%	0%	74%
	AC Tune up	0%	0%	90%
HEEP RSOL Schools Outreach	School Kit	0%	0%	100%
CWA	CWA	4%	0%	96%
	LI Wx	0%	0%	100%

3.1.2.1.2 POSITIVE ENERGY HOMES NET SAVINGS APPROACH

The Evaluator completed a survey of builder contacts to estimate net savings. For the builder interview–derived net savings value, we estimated a free-ridership probability based on the average of the three scores described below for each builder. Free-ridership scores were developed for the impacts resulting from the construction standards and geothermal heat pumps. Savings for the two builders were weighted by the number of homes completed to estimate program net savings.

3.1.2.1.3 PROGRAM COMPONENTS SCORE

The Program Components Score measured how influential several factors were in builders’ decisions to construct efficient homes. Respondents rated the influence of the following factors on a scale from 1 to 5, where 1 meant “not at all influential” and 5 meant “extremely influential”:

- Technical assistance or information from Program staff
- Technical assistance or information from HERS raters
- Program rebates
- Program informational materials

Each rating was converted to a score as follows:

- 1 = 0
- 2 = 0.25
- 3 = 0.5
- 4 = 0.75
- 5 = 1

The Program Components Score was the highest score among the four components MAX (Component 1–4):

3.1.2.1.4 PROGRAM INFLUENCE SCORE

The Program Influence Score was based on the respondent’s rating of how likely they would have been to build any efficient homes if the channel had not provided rebates and information. Builders rated the likelihood on a scale from 1 (“not at all likely”) to 5 (“very likely”).

Scores were assigned as follows:

- 1 = 1
- 2 = 0.75
- 3 = 0.5
- 4 = 0.25
- 5 = 0

3.1.2.1.5 NO PROGRAM SCORE

Builders were asked a series of questions to estimate how many homes their firm would have built to the Program's construction standards in the absence of the channel:

- Whether they would have built fewer or the same number of homes to the Program standards if the Program had not been available.
- If fewer, the percentage of those homes that would still have met Program standards without the Program.

To account for practice changes linked to the channel's education and training, builders were also asked which energy-efficient elements they had added to their standard homes since working with OG&E, including:

- Higher insulation levels
- Improved air sealing or lower blower-door targets
- Higher-efficiency HVAC equipment
- Duct sealing or ducts in conditioned space
- Low-U-factor or low-SHGC windows
- High-efficiency water heaters
- LED lighting as standard
- Smart or programmable thermostats

These questions were designed to assess the channel's influence on both current and persistent construction practices.

The No Program Score was calculated using:

1 – (% of homes built in the absence of the Program × share of new construction elements selected)

The share of new construction elements selected was the number of adopted elements divided by the total list of elements.

3.1.2.1.6 FREE-RIDERSHIP SCORE

The free-ridership score was calculated as:

1 – Average (Program Components Score, Program Influence Score, No Program Score)

To comply with the Arkansas requirement to not have partial free-ridership, the final score was rounded to a zero or one.

3.1.2.1.7 SPILLOVER

Builders were asked whether they had built any additional homes that met the PEH's efficiency standards. None reported doing so. Based on these responses, no spillover was identified for the program.

3.1.2.2 Commercial Energy Efficiency Program (CEEP)

This section covers the net savings approach for the CEEP.

3.1.2.2.1 OVERALL APPROACH

Table 3-25 summarizes the net savings approach used for each of the program channels.

TABLE 3-25 SUMMARY OF COMMERCIAL AND INDUSTRIAL SOLUTIONS PROGRAM NET SAVINGS APPROACHES

Program	Net Savings Approach
CEEP C&I Solutions	Participant Self-Report
CEEP SAGE	Participant Self-Report
CEEP SBS	Participant Self-Report
CEEP Midstream	Participant Self-Report
CEEP CEI	Participant Self-Report

3.1.2.2.2 DOWNSTREAM PARTICIPANT SELF-REPORT FREE-RIDER APPROACH

Several criteria were used to determine which portion of a participant's savings was attributed to free-ridership. The corresponding survey questions are listed below. For direct install measures, the question wording was adjusted to reflect that the equipment was provided at no cost to the customer, rather than referencing an incentive.

The first criterion came from responses to the following questions:

- "Would you have been financially able to install the equipment or measures without the financial incentive from the Program?"
- "To confirm, your organization would NOT have allocated the funds to complete a similar energy saving project if the program incentive was not available. Is that correct?"

If a customer answered "No" to the first question and confirmed the response by saying "Yes" to the second question, a free-ridership score of 0 was assigned to the project. That is, if a customer required financial assistance from the program to undertake a project, that customer was not deemed a free-rider.

For decision makers who indicated they could undertake energy efficiency projects without financial assistance from the program, three additional factors determined what percentage of savings was attributable to free-ridership. The three factors were:

- Plans and intentions of the customer to install a measure even without support from the program;
- Influence that the program had on the decision to install a measure; and
- A customer's previous experience with a measure installed under the program.

For each of these factors, rules were applied to decision-maker survey responses to develop binary variables indicating whether a participant showed free-ridership behavior. The first required step was to determine if a participant stated that their intention was to install an energy efficiency measure without

program assistance by applying a set of rules to the decision-maker's survey response. Two binary variables were constructed to account for customer plans and intentions: one based on a more restrictive set of criteria that described a high likelihood of free-ridership, and a second based on a less restrictive set of criteria that described a relatively lower likelihood of free-ridership.

The first, more restrictive criteria (Definition 1) indicating customer plans and intentions that likely signified free-ridership were as follows:

- The respondent answered "Yes" to the following two questions: "Did you have plans to install the measure before participating in the program?" and "Would you have gone ahead with this planned installation of the measure even if you had not participated in the Program?"
- The respondent answered "No, the program did not affect level of efficiency that we chose for equipment" in response to the following question: "How did the availability of information and financial incentives through the Program affect the level of energy efficiency you chose for [Equipment/Measure]?"

The second, less restrictive criteria (Definition 2) indicating customer plans and intentions that likely signified free-ridership were as follows:

- The respondent answered either "Definitely would have installed" or "Probably would have installed" to the following question: "Would you have completed the [Equipment/Measure] project even if you had not participated in the program?"
- The respondent answered "No, the program did not affect level of efficiency that we chose for equipment" in response to the following question: "How did the availability of information and financial incentives through the Program affect the level of energy efficiency you chose for [Equipment/Measure]?"

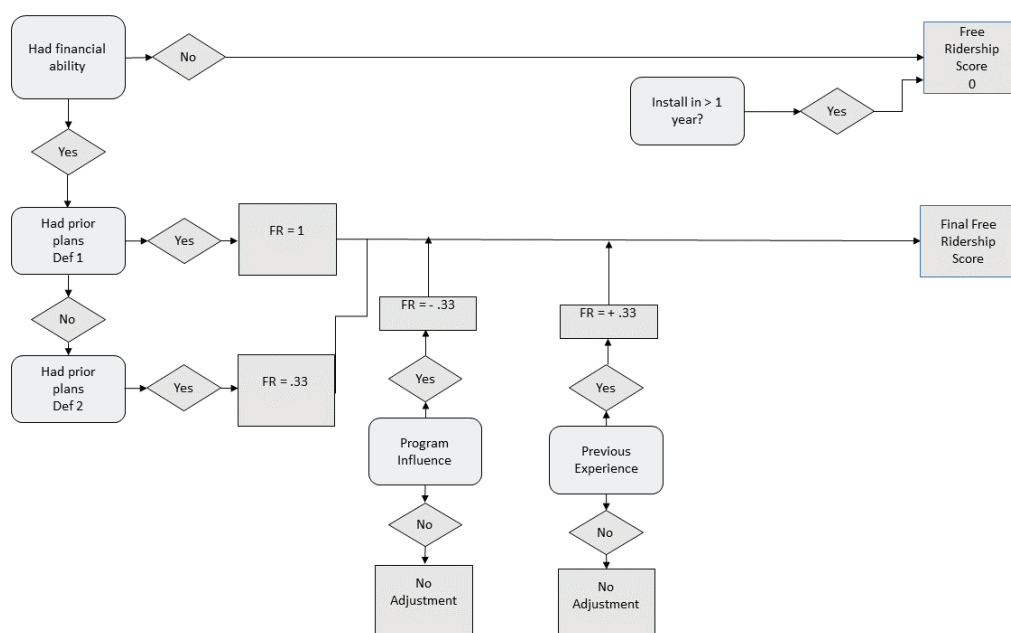
The second required factor was determining if a customer reported that a recommendation from a program representative or experience with the program was influential in the decision to install a piece of equipment or measure. This criterion indicated that the program's influence may have lowered the likelihood of free-ridership when any of the following conditions were true:

- The respondent answered "Very important" to the following question: "How important was previous experience with the Program in making your decision to install [Equipment/Measure]?"
- The respondent answered "Definitely would not have" or "Probably would not have" to the following question: "If the Program representative had not recommended implementing the [Equipment/Measure], how likely is it that you would have implemented it anyway?"

The third required factor was determining if a participant in the program indicated that they had previously installed an energy efficiency measure similar to one that they installed under the program without an energy efficiency program incentive during the last three years. A participant indicating that they had installed a similar measure was considered to have a higher likelihood of free-ridership.

The criteria indicating that previous experience may have signified a higher likelihood of free-ridership were as follows:

- Figure 3-1 summarized the scoring of free-ridership for downstream incentives. In keeping with the Arkansas TRM requirement, all participants were assigned a score of 0 or 1 for free-ridership for a given measure (i.e., no partial free-ridership was assigned) by rounding the final free-ridership score.



3.1.2.2.3 MIDSTREAM PARTICIPANT FREE-RIDERSHIP APPROACH

3.1.2.2.3.1 PRIOR EXPERIENCE INSTALLING SIMILAR EQUIPMENT SCORE

- Whether the business had previously installed similar equipment
- Whether any of those prior installations were completed without receiving a program incentive

For cases where respondents stated they had installed similar equipment and that at least one installation occurred without a program incentive, the factor was assigned a score of 1, indicating evidence of free-ridership. When respondents had no prior similar installations, or such installations had always involved incentives, the factor was scored as 0.

3.1.2.2.3.2 INFLUENCE OF THE PROGRAM DISCOUNT ON THE PURCHASE DECISION SCORE

The second factor measured the extent to which the OG&E discount influenced the purchase decision. The scoring relied on the respondents' rating of the importance of the discount in the purchase decisions. Using this response, a free-ridership score was calculated as: Program Influence = 10–Response/ 10.

3.1.2.2.3.3 BEHAVIOR WITHOUT THE DISCOUNT SCORE

The third factor evaluated how respondents believed they would have behaved if the OG&E discount had not been available. This factor was based on three survey items:

- Whether the respondent stated they would have purchased the equipment without the discount.
- Whether the respondent stated they would have installed the same equipment without the discount.
- How likely the respondent reported they were to install the same equipment without a discount, on the scale used in the survey.

These three responses were combined to produce a Behavior without Discount factor score.

The factor was assigned a value of 1 when respondents:

- reported that they would have purchased the equipment without the discount,
- reported that they would have installed the same equipment without the discount, and
- indicated they were very likely to install the same equipment without the discount.

The factor was assigned a value of 0.5 when respondents:

- reported that they would have purchased the equipment without the discount,
- reported that they would have installed the same equipment without the discount, and
- indicated they were somewhat likely to install the same equipment without the discount.

All other response combinations received a value of 0.

3.1.2.2.3.4 OVERALL FREE-RIDERSHIP SCORE

An overall free-ridership score was based on the average of the three scores. If the average was greater than .5, the participant was considered a free-rider.

3.1.2.2.4 DOWNSTREAM AND MIDSTREAM PARTICIPANT SPILLOVER APPROACH

To assess participant spillover savings, survey respondents were asked whether they implemented any additional energy saving measures for which they did not receive a program incentive. Respondents were also asked to provide information on the measures implemented for use in estimating the associated energy savings.

To determine if the savings from the reported measures are attributable to the program, survey respondents were asked questions about the degree to which their experience with the program

influenced them to implement the measures and the likelihood of implementing the measures in the absence of the program. Specifically, respondents were asked the following questions:

- SO1: How important was your experience with the [PROGRAM] in your decision to install this equipment?
- SO2: If you had NOT participated in the [PROGRAM], how likely is it that your organization would still have installed this equipment?

The responses to these questions are used to develop a spillover score as follows: Spillover = Average (SO1, 10 – SO2)

Savings from measures associated with a spillover score greater than 7 were considered attributable to the program.

The final NTG estimates for the program is calculated as: $NTG = 1 - \text{free-ridership} + \text{participant spillover}$

3.1.2.2.5 STRATEGIC ENERGY MANAGEMENT NET SAVINGS (CEEP: CEI)

The Evaluator completed an interview with a participant in CEI that included several questions about the programs influence on the projects completed through the program. The topics covered included:

- How the program contributed, if at all, to the identification and implementation of the projects.
- If the projects had been identified before working with the SEM program.
- The likelihood of identifying and implementing the energy saving measures if they had not participated in the program.

Based on a review of the responses provided, the Evaluator concluded that the projects would most likely not have occurred without program support (i.e., the participant was not a free-rider). The support that facilitated the projects included:

- CEI meetings provided ongoing guidance on energy-saving opportunities and maintained visibility of potential projects.
- CEI representatives repeatedly followed up on thermostat-related actions, which reinforced internal discussions about improving temperature controls.
- Program staff offered recommended thermostat settings and explained the benefits of programmable or lockable thermostats, helping staff understand the potential value of upgrades.
- CEI engagement validated thermostat misuse as a priority issue, strengthening staff motivation to address it even though the project was ultimately postponed due to financial constraints.
- Beyond thermostat activities, CEI shared data on plant-level savings, which staff viewed as informative but not directly influential on their committee's actions.
- Program support was primarily informational—providing best-practice suggestions and progress updates—rather than direct implementation assistance or financial support.

3.1.3 Non-Energy Benefits

Electric energy efficiency programs claimed primary fuel savings after the installation of measures that achieve energy (kWh) savings and demand (kW) reductions. Savings are monetized with the avoided costs. In Arkansas, the IEM, in coordination with investor-owned utilities (IOUs) and other stakeholders through the Parties Working Collaboratively (PWC), has also acknowledged that other non-energy benefits (NEBs)

are associated with the implementation of these measures. These other benefits can include reductions in water usage, fossil fuel consumption, and avoided and deferred replacement costs.

These NEBs are an addition to Arkansas programs under the authorization of AR TRM 6.1. Volume 1 – Protocol L. After reviewing the guidance from the PWC, the Commission issued Order No. 30 on December 10, 2015, which provided direction and guidance regarding the inclusion of Non-Energy Benefits (“NEBs”) in the Technical Reference Forum (p. 21 of 21).¹³

“The Commission therefore directs that the IEM be requested to recommend an approach for quantification of deferred equipment replacement NEBs in individual instances when they are material and quantifiable. Approval of deferred customer equipment NEBs, however, is conditioned as follows: The Commission directs that each recommended approach for customer deferred equipment replacement NEB quantification shall be included within the annual TRM update filing, and that its reasonableness shall be addressed in testimony by the IEM and/or Staff, and may be addressed by other parties, so that the Commission may approve or disapprove such proposed NEB quantifications.

The Commission therefore orders and directs that the following three categories of NEBs be consistently and transparently accounted for in all applications of the TRC test, as it is applied to measures, programs, and portfolios:

- o benefits of electricity, natural gas, and liquid propane energy savings (i.e., other fuels);*
- o benefits of public water and wastewater savings;*
- o benefits of avoided and deferred equipment replacement costs as conditioned herein.”*

Per this Protocol,¹⁴ the recommended approach to quantify the NEBs fell within these three categories.

Per Commission Order, NEB concentrates on other fuels, water, and deferred equipment costs. In response to the Commission Order for NEB, a recent protocol addition is Protocol L, which encompasses NEB:

- Protocol L1: Non-Energy Benefits for Electricity, Natural gas, and Liquid Propane (“other fuels”);
- Protocol L2: Non-Energy Benefits for Water Savings; and
- Protocol L3: Non-Energy Benefits of Avoided and Deferred Equipment Replacement Costs.

The program tracking system captures inputs needed for NEB calculations based on the AR TRM v10.0 algorithm. In reviewing NEB development, the Evaluator review included assessing the consistency of inputs for all assumptions for each measure. The tables below outline the potential residential and C&I NEB for the portfolio.

TABLE 3-26 RESIDENTIAL NEB BY MEASURE¹⁵

Measure	Water	Other Fuel	ARC/ DRC	AR TRM v10.0 Section
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13 The Arkansas TRM, Protocol L.

14 Ibid.

15 This tables represents potential NEBs for each measure. In some cases, there is either not enough data available to calculate those NEBs, or that NEB was not applicable in that application.

Air Infiltration		X		2.2.9
Ceiling Insulation		X		2.2.2
Duct Sealing		X		2.1.11
LED Lamp		X	X	2.5.1; 2.5.2
Faucet Aerator	X	X		2.3.4
Low-Flow Showerhead	X	X	X	2.3.5
Wall Insulation		X		2.2.3
Window		X		2.2.7

TABLE 3-27 C&I NEB BY MEASURE¹⁶

Measure	Water	Other Fuel	ARC / DRC	AR TRM v10.0 Section
Commercial door air infiltration		X		3.2.11
Commercial showerheads	X			3.3.5
Faucet aerators	X			3.3.2
High intensity discharge (HID) lamps		X	X	3.6.3
Integrated ballast CFL lamps		X	X	3.6.3
Integrated ballast LED lamps		X	X	3.6.3
LEDs		X	X	3.6.3
Lighting controls		X	X	3.6.2
Low-flow pre-rinse spray valves	X		X	3.8.11
Magnetic ballast T5 or premium T8 retrofit of T12		X	X	3.6.3
Midstream: exterior fixtures		X	X	3.6.3
Midstream: interior fixtures		X	X	3.6.3
Midstream: interior lamps		X	X	3.6.3
Modular CFLs and CCFLs		X	X	3.6.3
Other linear fluorescents		X	X	3.6.3
Smart thermostats		X		N/A

NEB estimates are found in each of the program chapters within this report.

3.2 Process Evaluation

Our approach to the process evaluation was to:

- Gain in-depth understanding of program operations, challenges, and evaluation needs through key staff interviews, complemented with program documentation review including implementation contractor status reports.
- Update assessment of success in achieving the goals and objectives established in the Commission's Comprehensiveness Checklist.

¹⁶ This table represents potential NEBs for each measure. In some cases, there is either not enough data available to calculate those NEBs, or that NEB was not applicable in that application.

- Report findings on customer experiences with the program and demographic characteristics collected as part of survey efforts, including demographics related to Act 1102 requirements to benefit LIHEAP-eligible customers and customers aged 65 and older.
- Follow AR TRM v10.0 Volume 1 Protocol C, leverage prior year's process information and conduct limited process evaluations for all programs.

Process evaluations in general assess organizational and procedural aspects of programs to provide feedback on aspects of programs that are functioning well and contribute recommendations when areas of improvement are identified. The Evaluator has consulted and followed TRM v10.0 Volume 1 Protocol C, to determine whether conducting a process evaluation is appropriate for a specific program, as well as the appropriate timing for the process evaluation. Specifically, Protocol C defines the criteria that require a process evaluation to be undertaken as well as criteria justifying conducting a process evaluation. Table 3-28 provides details on specific criteria that must be met prior to proceeding with a process evaluation.

TABLE 3-28 AR TRM v10.0 Volume 1 Protocol C: Process Evaluation Guidance

Criteria for Process Evaluations
Process evaluation required if... ▪ Program is new/modified ▪ No process evaluation has been undertaken during current funding cycle ▪ A change in program implementation occurred.
Process evaluation potentially needed if... ▪ Program impacts are lower than expected ▪ Goals (both informational and educational) are not being achieved ▪ Rates of participation are lower/slower than expected ▪ Program's operational system is slow to get up and running ▪ Cost effectiveness of the program is less than expected ▪ Participants (customers & market actors) report problems/low rates of satisfaction with program

After reviewing process evaluation activities already completed, including information provided by implementation contractors at the project kick-off meeting, the level of process evaluation was determined. The criteria that would indicate that the conditions were appropriate to complete a process evaluation.

TABLE 3-29 DETERMINATION OF PROCESS EVALUATION

Criterion	HEEP	CWA / Act 1102	CEEP
Determining Appropriate Timing			
New and innovative components	No	No	No
Process evaluation completed during funding cycle	Yes	Yes	No
New vendor or implementation Trade Ally	No	No	No
Determining Appropriate Conditions			
Impact problems	No	No	No
Information/educational objectives not met	No	No	No
Participation problems	No	No	No
Operational challenges	No	No	No
Program is cost effective	Yes	Yes	Yes
Negative feedback	No	No	No

Problems with program or low satisfaction	No	No	No
Level of Effort in PY2025	Limited (Full for PEH New Homes)	Limited	Full

3.2.1 Review of Program Materials

To prepare for and understand program design and delivery, the Evaluator reviewed program materials and documentation provided by OG&E. This included the program filing, program manuals, monthly progress reports provided by CLEAResult, and the program website. Additionally, the program team reviewed program tracking data to understand how the program tracks and documents program participation and key variables.

3.2.2 Program Staff Interviews

The Evaluator conducted qualitative, semi-structured interviews with program staff to understand recent program changes, as well as key successes and challenges related to program design and delivery. The interviews were exploratory in nature.

Across the Residential Solutions portfolio, two interviews were conducted with seven program team members, including three OG&E staff and four CLEAResult staff. For the LivingWise channel, additional interviews were conducted with two AM Conservation staff.

For both the CWA and CEEP Programs, the Evaluation team completed two interviews per program with seven program team members in each case, including three OG&E staff and four CLEAResult staff.

3.2.3 Participant Surveys

As a key evaluation activity, the Evaluator completed surveys of participants in the following channels:

- CEEP Large C&I
- CEEP SAGE
- CEEP SBS
- CEEP Midstream
- CEEP CEI

The survey data collected was used to verify project completion, estimate net-to-gross ratios, and assess program participant experience with the channels.

Section 3.5.2 presents additional details on the administration of the surveys.

3.3 Cost Effectiveness Analysis

The methodology for calculating cost-effectiveness results can be found in Appendix B.

3.4 Sampling

In adherence to industry standards, evaluations commonly apply 90% confidence intervals and allow for a margin of error of $\pm 10\%$ (referred to as 90/10 confidence and precision). This level of confidence and precision means that if new estimates were to be repeatedly derived using the same methodology, the average value would fall within $\pm 10\%$ of the sample value 90% of the time.

The Evaluator designed samples to minimize sampling error to within generally accepted industry standards of $\pm 10\%$ precision at the 90% confidence level (i.e., 90/10 precision and confidence) at the program level. We used sampling strategies that comply with AR TRM v10.0 Volume 1, Protocol B4. The two sample design procedures we used were:

- Simple random sampling.
- Stratified random sampling.

Note that in some cases, such as the administration of participant surveys, the Evaluator attempted to complete a census of all participants for whom contact information was available at the time of the research.

3.4.1 Simple Random Sampling Methodology

To estimate the sample size requirements under a simple random sampling approach, the Evaluator used the following equations to estimate sample size requirements for each program and fuel type. Required simple random sample sizes were estimated as follows:

EQUATION 3-1: SAMPLE SIZE FOR INFINITE SAMPLE SIZE

$$n = \left(\frac{Z \times CV}{d} \right)^2$$

EQUATION 3-2: SAMPLE SIZE FOR FINITE POPULATION SIZE

$$n_0 = \frac{n}{1 + \left(\frac{n}{N} \right)}$$

Where:

- n = Sample size
- Z = Z-value for a two-tailed distribution at the assigned confidence level.
- CV = Coefficient of variation
- d = Precision level
- N = Population

For a sample that provides 90/10 precision, $Z = 1.645$ (the critical value for 90% confidence) and $d = 0.10$ (or 10% precision). The remaining parameter is CV, or the expected coefficient of variation of measures for which the claimed savings may be accepted. A CV of 0.5 was assumed for planning purposes, which yields a sample size of 68 for an infinite population. Sample sizes were adjusted for smaller populations via the method detailed in Equation 3-2.

3.4.2 Stratified Random Sampling Methodology

For the CEEP simple random sampling is not an effective sampling methodology, because often, a relatively small number of projects account for a high percentage of the estimated savings for the

program. Therefore, the CV values developed across all business program projects are typically large and positively skewed distribution of savings.

Under this condition, 90/10 confidence and precision can be achieved more efficiently by stratifying the population of projects on expected energy savings. With a stratified random sample design, the Evaluator instead select several sites with large savings for the sample with certainty (i.e., a census of projects in this stratum are included in the sample) and take a random sample of sites in strata comprised of projects with smaller energy savings.

3.5 Data Collection

3.5.1 Site Visit Data Collection

Additional information about the Evaluator alternative approach can be found in Section 3.1.1.6 Site Visits.

3.5.2 Survey Data Collection

The Evaluator administered participant surveys to samples of program estimates to collect data for use in estimating free-ridership and spillover to calculate net savings; and to collect data on the participant experience with the program to inform the process evaluation.

The following section summarizes survey data collection procedures.

3.5.2.1 HEEP Survey and Interview Data Collection

The Evaluator administered surveys to participating builders in the PEH channel of HEEP in December 2025 and January 2026. Survey data were collected through web surveys. Table 3-30 summarizes the data collection activities.

- **Web survey:** Respondents with available emails were sent an invitation to the survey. Non-respondents were sent up to two reminder emails.

TABLE 3-30 HEEP SURVEY COUNTS BY CHANNEL

Channel	Respondent Group	Data Collection	Frame Source	Mode	Stratification Approach	Sample Size	Timing
PEH	Participant Builders	Program Influence and Experience	OG&E	Web	Census of Participants	2	December 2025 and January 2026

The following chapters show the results of the evaluation for each program.

3.5.2.2 CEEP Survey and Interview Data Collection

The Evaluator administered surveys to participants in the CEEP between November 2025 and January 2026. Survey data were collected through web and phone surveys. Table 3-31 summarizes the data collection activities.

- **Web survey:** Respondents with available emails were sent an invitation to the survey. Non-respondents were sent up to two reminder emails.

- **Phone survey:** Some program participants were missing emails and were contacted by telephone. Additionally, the Evaluator attempted to complete the survey by telephone with participants that did not respond to the email invitation.

TABLE 3-31 CEEP SURVEY COUNTS BY CHANNEL

Channel	Respondent Group	Data Collection	Frame Source	Mode	Stratification Approach	Sample Size	Timing
CEI	Participant	Program Influence and Experience	Program Implementation Contractor	Telephone	Census of Participants	1	January 2026
Midstream	Participant	Program Influence and Experience	Tracking Data	Web	Census of Participants	3	November 2025 January 2026
SBS	Participant	Program Influence and Experience	Tracking Data	Web & Telephone	Census of Participants	1	November 2025 January 2026
Large C&I/SAGE	Participant	Program Influence and Experience	Tracking Data	Web & Telephone	Census of Participants	8	January 2026
CEEP Trade Allies	Participant	Program Experience	Tracking Data	Web	Census of Participants	0	December 2026

The following chapters show the results of the evaluation for each program.

4 Home Energy Efficiency Program (HEEP)

4.1 Summary

The tables below report ex-ante gross, ex-post gross, ex-post net energy savings (kWh) (both annual and lifetime), demand reduction (kW), participation, incentive spend, and ex-post net NEBs, by channel and measure, where applicable.

TABLE 4-1 HEEP ENERGY SAVINGS (kWh)

Channel / Measure	Ex-Ante Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Post Gross Energy Savings (kWh)	NTG (kWh)	Ex-Post Net Energy Savings (kWh)
Consumer Products	1,056,827	78.4%	828,544	94.1%	780,068
Advanced Power Strip	354,264	100.0%	354,264	91.7%	324,978
Air Purifier	18,437	102.5%	18,897	84.5%	15,968
Dehumidifier	9,248	170.7%	15,790	79.5%	12,553
LED Lamp (Food Bank)	484,364	51.1%	247,370	100.0%	247,370
Outlet Gasket (Kit)	84,031	100.0%	84,012	100.0%	84,012
Smart Thermostat	12,745	99.0%	12,617	80.1%	10,110
Water Cooler	2,891	102.3%	2,958	70.0%	2,070
Weather Stripping	44,194	100.0%	44,185	100.0%	44,185
Window AC	46,654	103.9%	48,452	80.1%	38,822
Residential HVAC	264,023	101.4%	267,756	90.8%	243,197
Central AC Replacement	7,331	99.7%	7,309	100.0%	7,309
Central AC Tune-up: M&V	15,438	100.1%	15,447	90.0%	13,902
Central AC Tune-up: Modeled	98,954	100.0%	98,948	90.0%	89,054
Central HP Replacement	13,945	106.6%	14,862	100.0%	14,862
Central HP Tune-up: M&V	18,160	100.0%	18,152	90.0%	16,336
Central HP Tune-up: Modeled	110,195	102.6%	113,039	90.0%	101,735
Residential Solutions	1,667,973	101.0%	1,684,512	99.9%	1,682,782
Advanced Power Strip	10,670	90.5%	9,658	100.0%	9,658
Advanced Power Strip (MF)	28,499	86.6%	24,672	100.0%	24,672
Air Infiltration (MF)	473,679	100.4%	475,418	100.0%	475,418
Apartment Fee	0	100.0%	0	100.0%	0
Assessment	0	100.0%	0	100.0%	0
Duct Sealing (MF)	1,094,768	102.0%	1,116,477	100.0%	1,116,477
Faucet Aerator (MF)	12,548	99.3%	12,460	100.0%	12,460
LED Lamp (MF) (Standard)	4,611	101.8%	4,692	100.0%	4,692
LED Lamp (Standard)	2,494	102.8%	2,563	100.0%	2,563
Low-Flow Showerhead (MF)	21,615	90.7%	19,607	100.0%	19,607
Pool Pump	7,965	98.8%	7,865	78.0%	6,135
Window	11,123	99.8%	11,099	100.0%	11,099
LivingWise® Schools Outreach	314,643	80.6%	253,543	100.0%	253,543
Advanced Power Strip	175,333	82.9%	145,372	100.0%	145,372
Bathroom Aerator (1.0 GPM)	17,052	64.7%	11,027	100.0%	11,027
Kitchen Aerator (1.5 GPM)	11,384	55.2%	6,284	100.0%	6,284
Low-Flow Showerhead (1.5 GPM)	110,874	81.9%	90,860	100.0%	90,860

Channel / Measure	Ex-Ante Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Post Gross Energy Savings (kWh)	NTG (kWh)	Ex-Post Net Energy Savings (kWh)
Positive Energy Homes	187,835	94.9%	178,205	100.0%	178,205
Advanced Power Strip	15,632	97.9%	15,303	100.0%	15,303
Ceiling Data	0	100.0%	0	100.0%	0
Clothes Dryer	795	81.4%	647	100.0%	647
Clothes Washer	840	97.9%	822	100.0%	822
Dishwasher	2,359	97.9%	2,309	100.0%	2,309
Door Data	0	100.0%	0	100.0%	0
Ducts Conditioned	0	100.0%	0	100.0%	0
Ducts Unconditioned	0	100.0%	0	100.0%	0
Foundation Data	0	100.0%	0	100.0%	0
HERS	150,820	95.5%	144,078	100.0%	144,078
HERS Cooling	0	100.0%	0	100.0%	0
HERS Heating	0	100.0%	0	100.0%	0
HERS Hot Water	0	100.0%	0	100.0%	0
HERS Inspection	0	100.0%	0	100.0%	0
HERS Lights and Appliances	0	100.0%	0	100.0%	0
Refrigerator	1,099	78.9%	867	100.0%	867
Smart Thermostat	14,612	95.6%	13,962	100.0%	13,962
Ventilation Fan	1,679	12.8%	215	100.0%	215
Wall Data	0	100.0%	0	100.0%	0
Window Data	0	100.0%	0	100.0%	0
HEEP Total	3,491,302	92.0%	3,212,560	97.7%	3,137,794
Sums may differ due to rounding.					

TABLE 4-2 HEEP DEMAND REDUCTION (kW) SUMMARY

Channel / Measure	Ex-Ante Gross Demand Reductions (kW)	Realization Rate (kW)	Ex-Post Gross Demand Reductions (kW)	NTG (kW)	Ex-Post Net Demand Reduction (kW)
Consumer Products	241.29	89.7%	216.49	92.4%	200.08
Advanced Power Strip	47.58	84.5%	40.21	91.7%	36.89
Air Purifier	2.12	102.6%	2.17	84.5%	1.84
Dehumidifier	2.10	165.8%	3.48	79.5%	2.76
LED Lamp (Food Bank)	67.60	59.5%	40.22	100.0%	40.22
Outlet Gasket (Kit)	43.24	100.0%	43.25	100.0%	43.25
Smart Thermostat	0.00	100.0%	0.00	100.0%	0.00
Water Cooler	0.32	102.7%	0.33	70.0%	0.23
Weather Stripping	22.75	117.6%	26.76	100.0%	26.76
Window AC	55.58	108.1%	60.07	80.1%	48.13
Residential HVAC	101.34	103.5%	104.85	90.4%	94.80
Central AC Replacement	1.46	195.9%	2.86	100.0%	2.86
Central AC Tune-up: M&V	9.38	100.3%	9.41	90.0%	8.47
Central AC Tune-up: Modeled	60.12	100.2%	60.25	90.0%	54.23
Central HP Replacement	0.16	900.7%	1.44	100.0%	1.44

Channel / Measure	Ex-Ante Gross Demand Reductions (kW)	Realization Rate (kW)	Ex-Post Gross Demand Reductions (kW)	NTG (kW)	Ex-Post Net Demand Reduction (kW)
Central HP Tune-up: M&V	3.89	100.1%	3.89	90.0%	3.51
Central HP Tune-up: Modeled	26.33	102.6%	27.00	90.0%	24.30
Residential Solutions	250.22	105.5%	263.99	99.9%	263.63
Advanced Power Strip	1.26	90.5%	1.14	100.0%	1.14
Advanced Power Strip (MF)	3.39	86.6%	2.93	100.0%	2.93
Air Infiltration (MF)	51.22	100.5%	51.48	100.0%	51.48
Apartment Fee	0.00	100.0%	0.00	100.0%	0.00
Assessment	0.00	100.0%	0.00	100.0%	0.00
Duct Sealing (MF)	180.10	107.9%	194.42	100.0%	194.42
Faucet Aerator (MF)	1.31	99.3%	1.30	100.0%	1.30
LED Lamp (MF) (Standard)	0.88	101.8%	0.90	100.0%	0.90
LED Lamp (Standard)	0.39	102.8%	0.40	100.0%	0.40
Low-Flow Showerhead (MF)	2.25	90.7%	2.04	100.0%	2.04
Pool Pump	1.68	98.8%	1.66	78.0%	1.29
Window	7.74	99.8%	7.73	100.0%	7.73
LivingWise® Schools Outreach	34.64	80.4%	27.86	100.0%	27.86
Advanced Power Strip	20.15	82.4%	16.61	100.0%	16.61
Bathroom Aerator (1.0 GPM)	1.77	64.7%	1.15	100.0%	1.15
Kitchen Aerator (1.5 GPM)	1.18	55.2%	0.65	100.0%	0.65
Low-Flow Showerhead (1.5 GPM)	11.53	81.9%	9.45	100.0%	9.45
Positive Energy Homes	30.91	86.2%	26.65	100.0%	26.65
Advanced Power Strip	1.85	97.9%	1.82	100.0%	1.82
Ceiling Data	0.00	100.0%	0.00	100.0%	0.00
Clothes Dryer	0.08	82.0%	0.07	100.0%	0.07
Clothes Washer	0.20	97.9%	0.19	100.0%	0.19
Dishwasher	0.16	99.7%	0.16	100.0%	0.16
Door Data	0.00	100.0%	0.00	100.0%	0.00
Ducts Conditioned	0.00	100.0%	0.00	100.0%	0.00
Ducts Unconditioned	0.00	100.0%	0.00	100.0%	0.00
Foundation Data	0.00	100.0%	0.00	100.0%	0.00
HERS	26.46	91.7%	24.26	100.0%	24.26
HERS Cooling	0.00	100.0%	0.00	100.0%	0.00
HERS Heating	0.00	100.0%	0.00	100.0%	0.00
HERS Hot Water	0.00	100.0%	0.00	100.0%	0.00
HERS Inspection	0.00	100.0%	0.00	100.0%	0.00
HERS Lights and Appliances	0.00	100.0%	0.00	100.0%	0.00
Refrigerator	0.13	100.7%	0.13	100.0%	0.13
Smart Thermostat	0.00	100.0%	0.00	100.0%	0.00
Ventilation Fan	2.04	1.3%	0.03	100.0%	0.03
Wall Data	0.00	100.0%	0.00	100.0%	0.00
Window Data	0.00	100.0%	0.00	100.0%	0.00
HEEP Total	658.40	97.2%	639.85	95.8%	613.02
Sums may differ due to rounding.					

TABLE 4-3 HEEP LIFETIME ENERGY SAVINGS (kWh)

Channel / Measure	EUL ¹⁷	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Consumer Products	12	9,594,379	9,098,746
Advanced Power Strip	10	3,542,636	3,249,778
Air Purifier	9	170,073	143,711
Dehumidifier	12	189,481	150,637
LED Lamp (Food Bank)	13	3,092,126	3,092,126
Outlet Gasket (Kit)	15	1,260,185	1,260,185
Smart Thermostat	11	138,790	111,205
Water Cooler	10	29,576	20,703
Weather Stripping	15	662,769	662,769
Window AC	11	508,744	407,631
Residential HVAC	6	1,592,555	1,462,753
Central AC Replacement	25	182,716	182,716
Central AC Tune-up: M&V	7	110,273	99,246
Central AC Tune-up: Modeled	5	492,624	443,362
Central HP Replacement	8	111,816	111,816
Central HP Tune-up: M&V	8	137,296	123,567
Central HP Tune-up: Modeled	5	557,828	502,046
Residential Solutions	20	32,893,201	32,875,897
Advanced Power Strip	10	96,583	96,583
Advanced Power Strip (MF)	10	246,719	246,719
Air Infiltration (MF)	20	9,508,364	9,508,364
Apartment Fee	1	0	0
Assessment	1	0	0
Duct Sealing (MF)	20	22,329,545	22,329,545
Faucet Aerator (MF)	10	124,600	124,600
LED Lamp (MF) (Standard)	13	58,652	58,652
LED Lamp (Standard)	13	32,043	32,043
Low-Flow Showerhead (MF)	10	196,069	196,069
Pool Pump	10	78,654	61,350
Window	20	221,973	221,973
LivingWise® Schools Outreach	10	2,535,428	2,535,428
Advanced Power Strip	10	1,453,720	1,453,720
Bathroom Aerator (1.0 GPM)	10	110,270	110,270
Kitchen Aerator (1.5 GPM)	10	62,838	62,838
Low-Flow Showerhead (1.5 GPM)	10	908,599	908,599
Positive Energy Homes	20	3,622,413	3,622,413
Advanced Power Strip	10	153,034	153,034
Ceiling Data	1	0	0
Clothes Dryer	14	9,060	9,060
Clothes Washer	14	11,513	11,513
Dishwasher	15	34,642	34,642
Door Data	1	0	0
Ducts Conditioned	1	0	0

17 EULs for tune-up measures sourced from CLEAResult CoolSaver workpaper.

Channel / Measure	EUL ¹⁷	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Ducts Unconditioned	1	0	0
Foundation Data	1	0	0
HERS	23	3,241,751	3,241,751
HERS Cooling	1	0	0
HERS Heating	1	0	0
HERS Hot Water	1	0	0
HERS Inspection	1	0	0
HERS Lights and Appliances	1	0	0
Refrigerator	17	14,746	14,746
Smart Thermostat	11	153,581	153,581
Ventilation Fan	19	4,086	4,086
Wall Data	1	0	0
Window Data	1	0	0
HEEP Total	16	50,237,976	49,595,237
Sums may differ due to rounding.			

TABLE 4-4 HEEP COUNT OF MEASURES AND INCENTIVE SPEND

Channel / Measure	Count of Participants ¹⁸	Sum of Measures	Incentive Spend (\$)
Consumer Products	31	39,845	\$165,434
Advanced Power Strip	3,017	3,017	\$92,784
Air Purifier	60	60	\$1,500
Dehumidifier	106	106	\$2,650
LED Lamp (Food Bank)	2,424	9,696	\$29,088
Outlet Gasket (Kit)	2,424	24,240	\$12,120
Smart Thermostat	14	14	\$700
Water Cooler	6	6	\$150
Weather Stripping	2,424	2,424	\$19,392
Window AC	282	282	\$7,050
Residential HVAC	176	182	\$48,585
Central AC Replacement	8	8	\$3,270
Central AC Tune-up: M&V	15	15	\$3,775
Central AC Tune-up: Modeled	99	102	\$25,925
Central HP Replacement	7	7	\$2,990
Central HP Tune-up: M&V	8	8	\$2,000
Central HP Tune-up: Modeled	42	42	\$10,625
Residential Solutions	629	2,270	\$174,357
Advanced Power Strip	40	45	\$1,350
Advanced Power Strip (MF)	112	113	\$2,400
Air Infiltration (MF)	462	463	\$57,250
Apartment Fee	526	528	\$0

18 Count of participants reflect the number of unique participants by an identifiable field found in program tracking data. The Evaluator opted to include measure-level participant counts; however they will not add up to channel-level participant counts.

Channel / Measure	Count of Participants ¹⁸	Sum of Measures	Incentive Spend (\$)
Assessment	76	76	\$7,600
Duct Sealing (MF)	356	358	\$95,550
Faucet Aerator (MF)	202	289	\$289
LED Lamp (MF) (Standard)	57	208	\$1,040
LED Lamp (Standard)	23	92	\$368
Low-Flow Showerhead (MF)	53	70	\$560
Pool Pump	3	3	\$900
Window	24	25	\$7,050
LivingWise® Schools Outreach	10	5,920	\$74,651
Advanced Power Strip	1,480	1,480	\$41,599
Bathroom Aerator (1.0 GPM)	1,480	1,480	\$4,046
Kitchen Aerator (1.5 GPM)	1,480	1,480	\$2,701
Low-Flow Showerhead (1.5 GPM)	1,480	1,480	\$26,306
Positive Energy Homes	61	1,041	\$66,040
Advanced Power Strip	61	64	\$2,240
Ceiling Data	61	61	\$0
Clothes Dryer	5	5	\$0
Clothes Washer	5	5	\$0
Dishwasher	61	61	\$0
Door Data	61	61	\$0
Ducts Conditioned	61	61	\$0
Ducts Unconditioned	61	61	\$0
Foundation Data	61	61	\$0
HERS	61	61	\$40,925
HERS Cooling	61	61	\$0
HERS Heating	61	61	\$0
HERS Hot Water	61	61	\$0
HERS Inspection	61	61	\$22,875
HERS Lights and Appliances	61	61	\$0
Refrigerator	15	15	\$0
Smart Thermostat	45	45	\$0
Ventilation Fan	53	53	\$0
Wall Data	61	61	\$0
Window Data	61	61	\$0
HEEP Total	907	49,258	\$529,067
Sums may differ due to rounding.			

TABLE 4-5 HEEP EX-POST NET NEB

Channel / Measure	Ex-Post Net ARCs (\$)	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water Savings (gal)	Ex-Post Net Propane Savings (gal)
Consumer Products	\$23,204	-1,284	0	0
Advanced Power Strip	\$0	0	0	0
Air Purifier	\$0	0	0	0
Dehumidifier	\$0	0	0	0
LED Lamp (Food Bank)	\$23,204	-1,607	0	0

Channel / Measure	Ex-Post Net ARCs (\$)	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water Savings (gal)	Ex-Post Net Propane Savings (gal)
Outlet Gasket (Kit)	\$0	0	0	0
Smart Thermostat	\$0	323	0	0
Water Cooler	\$0	0	0	0
Weather Stripping	\$0	0	0	0
Window AC	\$0	0	0	0
Residential HVAC	\$0	0	0	0
Central AC Replacement	\$0	0	0	0
Central AC Tune-up: M&V	\$0	0	0	0
Central AC Tune-up: Modeled	\$0	0	0	0
Central HP Replacement	\$0	0	0	0
Central HP Tune-up: M&V	\$0	0	0	0
Central HP Tune-up: Modeled	\$0	0	0	0
Residential Solutions	\$728	51,842	323,093	0
Advanced Power Strip	\$0	0	0	0
Advanced Power Strip (MF)	\$0	0	0	0
Air Infiltration (MF)	\$0	10,957	0	0
Apartment Fee	\$0	0	0	0
Assessment	\$0	0	0	0
Duct Sealing (MF)	\$0	40,464	0	0
Faucet Aerator (MF)	\$0	0	129,240	0
LED Lamp (MF) (Standard)	\$503	0	0	0
LED Lamp (Standard)	\$225	-16	0	0
Low-Flow Showerhead (MF)	\$0	0	193,853	0
Pool Pump	\$0	0	0	0
Window	\$0	436	0	0
LivingWise® Schools Outreach	\$0	5,050	2,580,393	675
Advanced Power Strip	\$0	0	0	0
Bathroom Aerator (1.0 GPM)	\$0	515	273,811	69
Kitchen Aerator (1.5 GPM)	\$0	293	156,033	39
Low-Flow Showerhead (1.5 GPM)	\$0	4,242	2,150,549	567
Positive Energy Homes	\$0	153	14,440	0
Advanced Power Strip	\$0	0	0	0
Ceiling Data	\$0	0	0	0
Clothes Dryer	\$0	4	0	0
Clothes Washer	\$0	1	14,440	0
Dishwasher	\$0	14	0	0
Door Data	\$0	0	0	0
Ducts Conditioned	\$0	0	0	0
Ducts Unconditioned	\$0	0	0	0
Foundation Data	\$0	0	0	0
HERS	\$0	0	0	0
HERS Cooling	\$0	0	0	0
HERS Heating	\$0	0	0	0
HERS Hot Water	\$0	0	0	0
HERS Inspection	\$0	0	0	0
HERS Lights and Appliances	\$0	0	0	0
Refrigerator	\$0	0	0	0

Channel / Measure	Ex-Post Net ARCs (\$)	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water Savings (gal)	Ex-Post Net Propane Savings (gal)
Smart Thermostat	\$0	134	0	0
Ventilation Fan	\$0	0	0	0
Wall Data	\$0	0	0	0
Window Data	\$0	0	0	0
HEEP Total	\$23,932	55,762	2,917,926	675
Sums may differ due to rounding.				

The subsections of this chapter outline the evaluation approach and findings for each measure and channel of the Residential Solutions Program.

4.2 HEEP Description

The PY2025 HEEP is a multi-channel program, including Residential Solutions, LivingWise® Schools Outreach, HVAC Replacement and Tune-up, and Consumer Product Solutions. The Positive Energy Homes (PEH) - New Construction channel was introduced in HEEP for PY2024, and savings were first realized in PY2025.

4.2.1 Marketing and Outreach

Marketing and outreach for OG&E's residential programs in Arkansas is a shared responsibility between the utility and its implementation contractor. The implementation contractor, CLEAResult, leads the development and execution of most marketing activities, while the utility provides oversight and ensures alignment with branding and strategic objectives.

The implementation contractor develops creative materials for email campaigns, bill inserts, postcards, and other outreach collateral. These materials are reviewed by OG&E's marketing team for branding compliance and feedback before deployment. The contractor also manages paid search campaigns, social media advertising, and Meta campaigns, and has implemented billboard advertising. OG&E supplements these efforts with its own activities, including occasional radio and television spots, though these are managed separately by the utility's marketing team.

Marketing strategies are developed to address program needs and seasonal priorities. Staff described a process of weekly coordination meetings between OG&E and the contractor to review marketing activities and adjust focus based on program performance and enrollment trends. Outreach for HVAC tune-ups includes emails, postcards, and bill inserts, and is typically emphasized during warmer months, while weatherization marketing is prioritized during cooler seasons. This approach allows the team to shift resources toward channels that need additional participation to meet goals.

Community-based outreach is another component of the strategy. Both OG&E and the contractor participate in local events such as home and garden shows, back-to-school nights, and rodeos. The contractor also engages with local nonprofits and chambers of commerce to generate leads, particularly for weatherization programs. Trade allies support outreach by placing yard signs at job sites and distributing program collateral during service visits. For retail-based programs, the contractor conducts monthly in-store visits to verify pricing and signage, provide customer and employee education, and

ensure point-of-purchase materials are correctly displayed. Quarterly in-store events are held at select locations to promote incentivized products and educate customers.

Marketing for Positive Energy Homes includes targeted builder recruitment through homebuilder associations, sponsorship of industry events, and direct outreach to builders identified through association lists and lists of builders that are provided by RESNET. Builders participating in the program receive marketing support such as flyers for open houses and certificates demonstrating home efficiency, which can be shared with prospective buyers.

The program provides marketing support to contractors in several ways. Trade allies receive outreach materials and flyers to share with customers during service visits. For weatherization, contractors place yard signs at job sites to generate neighborhood awareness. HVAC contractors are identified on the utility's website and may use program-provided collateral to promote participation. While contractors can conduct their own outreach, program staff noted that most marketing activities are led by the implementation contractor, supplemented by utility branding oversight.

4.2.1.1 Marketing Content

The Evaluator reviewed the program website, social media posts, and flyers available from the program website. The table below summarizes the themes.

TABLE 4-6 SUMMARY OF RESIDENTIAL MARKETING THEMES

Theme	Summary	Example Phrases from Materials
Reduce Energy Use & Lower Bills	Program helps customers save energy and reduce monthly utility costs through targeted home improvements.	"Stay cool for less"
No Out-of-Pocket Cost	Eligible customers receive upgrades and services at no additional cost, making participation attractive.	"\$3,000 in upgrades—no added cost"
Comprehensive Home Improvements	Includes air sealing, insulation, duct sealing, HVAC tune-ups, and other efficiency measures for whole-home impact.	"Insulate your attic" / "Seal in the savings"
Personalized Energy Assessment	Energy advisors conduct home visits to recommend tailored upgrades based on specific needs.	"See if you qualify for home energy upgrades"
Rebates for Energy-Efficient Products	Offers rebates for items like smart thermostats, insulation, windows, and doors to encourage ongoing efficiency.	"Let us seal your windows and doors"
Wide Eligibility	Applies to various residential types (single-family, duplexes, mobile homes, some renters with approval).	"Check if you're eligible"
Comfort and Value Framing	Emphasizes improved home comfort alongside cost savings through better thermal performance and HVAC operation.	"Stay cool for less"
Encouragement to Engage	Strong calls to action: sign up online or contact the partner organization to start the process.	"Sign up" / "Learn More"

4.2.2 Program Contractors

Contractors play a central role in delivering several residential offerings, including HVAC tune-ups and replacements, weatherization, and multifamily direct-install services. Their responsibilities vary by program but generally include performing in-home assessments, installing energy efficiency measures, and completing required documentation for incentive processing.

4.2.2.1 Management and Oversight

Contractors are managed primarily by the implementation contractor, which oversees recruitment, onboarding, and ongoing engagement. Recruitment efforts include outreach to local contractors through word-of-mouth, industry recognition, and cold calls, as well as identifying potential partners based on prior rebate submissions. For weatherization, the contractor network is described as well-established, with occasional additions to meet demand. HVAC tune-up programs require more active recruitment due to high demand for technicians in the region.

The implementation contractor maintains regular communication with trade allies and provides a platform for feedback during annual kickoff meetings. These meetings review program performance, outline updates for the upcoming year, and allow contractors to raise questions or concerns. Contractors also receive program collateral and are listed on the utility's website as participating providers.

4.2.2.2 Training Requirements

Training is mandatory for participation in programs that involve technical work. HVAC tune-up contractors complete a full-day training specific to the CoolSaver protocol, covering program expectations, data collection requirements, and quality standards. This training includes a written exam, an in-field practical test, and five shadowed visits before contractors are approved to work independently. Annual refresher training is required to maintain participation.

Weatherization contractors must have at least one team member certified as a Building Performance Institute (BPI) Building Analyst Professional. Certifications are verified annually, and the implementation contractor offers BPI training as a service for which contractors pay a fee, typically multiple times per year. Kickoff meetings for weatherization programs also include a review of safety protocols and program standards. Multifamily contractors follow similar requirements, including BPI certification and shadowed inspections for initial projects. For new construction programs, internal HERS raters employed by the implementation contractor conduct inspections and modeling; these raters are certified through RESNET and subject to quality assurance protocols.

For the Tune-Up Channel, there are ongoing recruitment efforts, and fewer contractors compared to other channels. Contractors are found through word of mouth. Contractors don't have to be participating trade allies to perform tune-ups. They do, however, have to go through training classes and an annual refresher class to make sure all knowledge is retained.

For the Positive Energy Homes channel, CLEAResult's certified HERS raters are required to complete written, practical, and multiple field exams as part of their RESNET certification process. For ongoing quality control, CLEAResult performs desk reviews for every ten homes processed, and an in-field quality assurance review for every one hundred homes.

Trade allies that work for a multi-family program have an annual kickoff meeting, where they get a program refresher and are able to provide program feedback to OG&E and CLEAResult.

4.2.3 Residential Solutions Channel

Residential Solutions serves both single-family and multifamily customers and includes rebate offerings for certain products. Staff described the channel as combining in-home assessments, direct-install measures, and customer education, with several components designed to complement other residential programs.

The single-family assessment component functions as an entry point for customers who may qualify for weatherization services. These assessments provide education and limited direct-install measures while evaluating a home's energy-efficiency needs. When CWA eligibility is uncertain, staff conduct an assessment through Residential Solutions to determine whether the project should transition to CWA for comprehensive weatherization services. Staff noted that the two programs "work in tandem," with Residential Solutions serving as a feeder pathway rather than duplicating CWA's full set of installation activities.

The multifamily component has focused primarily on direct-install measures delivered at no cost to residents and has included lighting and some duct sealing. Staff indicated that this structure has been consistent over time.

Residential Solutions operates alongside other offerings and relies on trade allies for installation work. Marketing for the channel is integrated with broader residential outreach efforts, including email campaigns, postcards, and community events. Staff noted that single-family participation represents a smaller portion of activity compared to multifamily, with most single-family activity occurring in areas such as Fort Smith.

4.2.4 LivingWise® Schools Outreach

This channel includes an outreach channel targeted at students and was designed to provide an educational opportunity to learn about energy efficient opportunities in their home.

4.2.4.1 LivingWise Program Description

The LivingWise program is implemented by AM Conservation on behalf of OG&E and is designed to promote energy and water efficiency education among students. The program has historically focused on fifth-grade classrooms. The core structure of the program involves providing students with a take-home kit containing energy- and water-saving measures, alongside a curriculum for teachers that introduces concepts of energy efficiency, installation practices, and broader topics such as electric grid infrastructure. The curriculum is standards-aligned and intended to serve as supplemental material to help teachers meet classroom goals, which is particularly valuable in districts lacking dedicated science curricula.

Program management is handled by AM Conservation staff, with responsibilities divided between day-to-day operations and higher-level strategy and client communications. A program coordinator serves as the primary point of contact for teachers and administrators, supported by operations and design teams. Curriculum development is conducted in-house by a dedicated team with classroom teaching experience.

Kits are shipped in bulk to schools, organized for easy distribution by teachers. Each kit includes a student survey packet designed to capture pre- and post-program knowledge, home characteristics, and installation data for kit items. Surveys also include questions on program satisfaction and behavioral changes within the household. Teachers are incentivized to return at least 80% of student surveys through mini-grants in the form of e-gift cards. Staff reported that approximately 30–40% of teachers meet this threshold, though overall survey sample sizes have been sufficient for program needs. Additional feedback is collected through optional teacher and parent surveys and informal channels such as webinars and one-on-one communications. Teacher webinars are held once per semester to provide implementation guidance and solicit feedback.

Program participation is tracked primarily through kit distribution goals, supported by benchmarks for outreach activities such as email open rates and call dispositions. Data from student surveys and participation records are processed in AM Conservation’s internal systems and shared with OG&E in Excel format, accompanied by mapping keys for survey responses. Surveys may be returned via mail or completed online. Quality assurance for kit contents is managed by the operations team through established packing and shipping procedures, and any issues reported by teachers are resolved directly through email or phone communication.

4.2.4.2 Marketing and Outreach

Recruitment efforts target individual teachers rather than districts and employ a multi-channel approach, including direct mail, email campaigns, and phone calls. Outreach has also included in-person engagement at professional conferences and occasional collaboration with OG&E’s marketing team. While most participating schools are public, the program is open to any eligible grade level, including private and charter schools. Staff noted that recruitment strategies have evolved over time, particularly following disruptions caused by the COVID-19 pandemic, which shifted program timing and increased teacher turnover.

4.2.5 HVAC Replacement & Tune-up Channel (HVAC)

The HVAC channel consists of two components: advanced tune-ups and rebates for system replacements. Both are designed to improve energy efficiency in residential homes, with distinct processes for implementation and verification.

4.2.5.1 Tune-Up Services

Customers can enroll for an HVAC tune-up through program marketing efforts or via trade allies. Once enrolled, the implementation contractor assigns a participating contractor to perform the service. Contractors conducting tune-ups are vetted and trained by the implementation contractor and must follow the tune-up protocol, which includes proprietary diagnostic tools and pre- and post-testing to verify system performance. Tune-ups involve cleaning, cooling adjustments, and data collection beyond what is typical for standard tune-up services.

All data from the tune-up is captured digitally through CLEAResult’s CoolSaver application and transmitted to their CRM system for processing. The review process includes multiple steps: documentation and photo checks, engineering review for data integrity, and quality assurance/quality control (QA/QC) verification.

A separate QA/QC team performs these checks before the program team approves the project for payment. Contractors are required to complete annual refresher training to maintain participation.

4.2.5.2 System Replacement Rebates

The replacement component operates as a post-purchase rebate for customers who install qualifying HVAC systems. Customers submit rebate applications along with required documentation, including invoices and AHRI certificates. The implementation contractor reviews these submissions for completeness and accuracy. In addition to desk reviews, the program conducts on-site verification for approximately 10 percent of replacement projects to confirm installation. Unlike tune-ups, contractors performing replacements do not need to be enrolled as participating trade allies; any qualified contractor can complete the installation.

4.2.6 Consumer Products Solutions (CPS)

The Consumer Products channel primarily operates through retail partnerships and rebate offerings for energy-efficient products. Program staff described the structure as a mix of upstream and downstream incentives, with most activity occurring upstream through retail markdowns. Retail partners include large national chains such as Lowe's and Home Depot, regional stores like Dollar General, and nonprofit outlets such as Habitat for Humanity ReStores. Smaller retailers, including Ace Hardware, also participate under separate arrangements.

Upstream incentives are applied at the point of purchase for qualifying products, which have included weatherization items, advanced power strips, and other energy-saving measures. Staff noted that lighting is no longer included in retail markdowns, except for LEDs distributed through food banks. These food bank distributions also include other measures such as smart power strips, outlet gaskets, and weather stripping. Downstream rebates are limited to smart thermostats, which customers can submit via mail or email.

Retail engagement involves multiple activities managed by the implementation contractor. Staff conduct monthly in-store visits to verify pricing, ensure point-of-purchase materials are correctly displayed, and provide education to store employees and customers. Quarterly in-store events are held at select locations, featuring product displays and program information. All retail displays use branded point-of-purchase materials approved by the utility. For smaller retailers and nonprofit stores, the contractor works directly with store managers to encourage stocking of incentivized products, supplementing discounted pricing where necessary.

Data from retail sales is collected through invoices submitted by participating retailers. The implementation contractor reviews these invoices for accuracy, verifies purchase limits, and processes payments after multiple levels of review, including checks by shared services and program teams. This process ensures compliance with program requirements and prevents bulk purchasing beyond established limits.

4.2.7 Positive Energy Homes

Positive Energy Homes is a builder-focused new construction program designed to promote energy-efficient building practices in OG&E's Arkansas service territory. The program provides incentives

to builders who meet minimum efficiency requirements or achieve higher performance levels based on modeled kilowatt-hour (kWh) savings. Incentives are structured in tiers, with separate tiers for homes under and over 1,800 square feet. Additional bonuses are available for specific measures, including slab insulation, full encapsulation with foam, and installation of smart power taps. Staff noted that these bonuses are intended to encourage builders to incorporate measures that provide additional efficiency benefits. Multifamily projects are also eligible and receive a flat per-unit incentive rather than the tiered approach used for single-family homes.

The program uses Ekotrope to model home energy performance against a reference home built to the 2009 IECC code. Because Ekotrope does not model appliances, an appliance calculator is used to assign deemed savings for qualifying ENERGY STAR appliances such as dishwashers and laundry equipment. Homes that include these appliances receive additional prescriptive incentives.

Inspections are conducted by a certified HERS rater employed directly by the implementation contractor. Each home receives at least two site visits—a thermal or pre-drywall inspection and a final inspection—and staff noted that raters frequently conduct additional visits as needed during construction. Quality assurance occurs through several mechanisms. A QA/QC team performs desk reviews and conducts field inspections for approximately 10 percent of completed homes. In addition, a quality assurance designee conducts desk reviews for every ten homes processed and in-field QA reviews for every one hundred homes, following RESNET protocols. For multifamily projects, RESNET sampling procedures are available when requested, although staff noted that sampling has not yet been implemented in Arkansas.

Staff described the current program year as the first in which homes are being fully processed, following an earlier pilot period focused on builder recruitment and program setup. Participation is increasing as builders move through the pipeline, and staff indicated that current activity reflects an early stage of implementation rather than full program scale.

4.3 Evaluation Approach

The sections below outline the evaluation approaches for the Residential Solutions Program.

4.3.1 Gross Impact Evaluation

The Evaluator utilized the AR TRM 10.0 and New Orleans Louisiana (NO) TRM 8.0 values in assessing ex-post gross energy savings (kWh), demand reductions (kW) and NEBs from residential measures. Additionally, the Evaluator also examined the Excel workbooks used by the third-party implementation staff (CLEAResult and AM Conservation) to assess savings by measure. The workbook utilizes AR TRM 10.0 savings algorithms with Trade Ally inputs to calculate savings based on the measure and input parameters. The Evaluator verified the factor tables for each measure to ensure the values were appropriate. Section 3.1.1.3 lists the measures and sources for non- AR TRM approaches.

The following sections outline the impact evaluation approach for the HEEP. The calculation methodologies were performed as described in the AR TRM 10.0. Section 3.1.1.2 identifies the sections in the AR TRM 10.0 that were used for verification of measure-level savings.

The gross impact evaluation effort included the following:

- **Desk Review of Residential Calculations:** for all channels, the Evaluator referenced the AR TRM v10.0 methodologies to calculate savings from measures in HEEP.
- **Diversions from the AR TRM v10.0:** for select measures, the Evaluator cited different sources to evaluate and calculate savings. See Section 3.1.1.3 for more details.
- **Data Tracking Review:** for all channels, project data from the third-party implementer was reviewed to ensure that tracking systems followed Protocol A, B1 and B2 of the AR TRM 10.0.
- **Survey Analysis:** for LivingWise, student/parent surveys administered by AM Conservation were reviewed to determine in-service-rates (ISRs) and NEB estimates. For CPS, RSOL and HVAC, participant surveys were used to help develop ISRs for respective channel measures.
- **Field Verification:** The Evaluator completed verification site visits for projects in PY2025.
 - **Residential Solutions channel:** 30 total site visits.

For additional details, see Section 3.1.1 Gross Impact.

4.3.2 Net Impact Evaluation

Section 3.1.2 Net Impact summarizes the net savings approach.

4.4 Evaluation Findings

4.4.1 Gross Impact Findings

After reviewing the tracking data and inputs for savings calculations, the Evaluator provided verified ex-post savings per AR TRM v10.0 Protocols. The savings from the measures below were verified, and matched, to the calculations provided by CLEAResult.

4.4.1.1 Residential Solutions

The ex-post annual and lifetime energy (kWh) saving impacts are summarized in Table 4-7 and Table 4-8.

TABLE 4-7 RESIDENTIAL SOLUTIONS ANNUAL SAVINGS SUMMARY

Measure	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)
Advanced Power Strip	10,670	9,658	90.5%	1.26	1.14	90.5%
Advanced Power Strip (MF)	28,499	24,672	86.6%	3.39	2.93	86.6%
Air Infiltration (MF)	473,679	475,418	100.4%	51.22	51.48	100.5%
Apartment Fee	0	0	100.0%	0.00	0.00	100.0%
Assessment	0	0	100.0%	0.00	0.00	100.0%
Duct Sealing (MF)	1,094,768	1,116,477	102.0%	180.10	194.42	107.9%
Faucet Aerator (MF)	12,548	12,460	99.3%	1.31	1.30	99.3%
LED Lamp (MF) (Standard)	4,611	4,692	101.8%	0.88	0.90	101.8%
LED Lamp (Standard)	2,494	2,563	102.8%	0.39	0.40	102.8%
Low-Flow Showerhead (MF)	21,615	19,607	90.7%	2.25	2.04	90.7%
Pool Pump	7,965	7,865	98.8%	1.68	1.66	98.8%
Window	11,123	11,099	99.8%	7.74	7.73	99.8%
RSOL Total	1,667,973	1,684,512	101.0%	250.22	263.99	105.5%
Sums may differ due to rounding.						

TABLE 4-8 RESIDENTIAL SOLUTIONS LIFETIME SAVINGS SUMMARY

Measure	Ex-Post Gross Energy Savings (kWh)	EUL	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Advanced Power Strip	9,658	10	96,583	96,583
Advanced Power Strip (MF)	24,672	10	246,719	246,719
Air Infiltration (MF)	475,418	20	9,508,364	9,508,364
Apartment Fee	0	1	0	0
Assessment	0	1	0	0
Duct Sealing (MF)	1,116,477	20	22,329,545	22,329,545
Faucet Aerator (MF)	12,460	10	124,600	124,600
LED Lamp (MF) (Standard)	4,692	13	58,652	58,652
LED Lamp (Standard)	2,563	13	32,043	32,043
Low-Flow Showerhead (MF)	19,607	10	196,069	196,069
Pool Pump	7,865	10	78,654	61,350
Window	11,099	20	221,973	221,973
RSOL Total	1,684,512	20	32,893,201	32,875,897
Sums may differ due to rounding.				

4.4.1.1.1 DISCUSSION OF REALIZATION RATES

Overall, there were very minor discrepancies in the ex-ante estimations and ex-post savings. Part of the reason for the slightly lower or higher realization rates were driven by the measure ISRs from the residential site visits completed in PY2025. Some of the measure ISRs were averaged with historical ISRs. See Section 3.1.1.7.2 for component-level ISRs.

4.4.1.2 LivingWise® School Outreach

The Evaluator reviewed the associated tracking data and program documentation and calculated ex-post savings in accordance with the methodologies in the AR TRM v10.0. The following measures were included in each of the school kits that were distributed through the LivingWise channel:

- (1) Advanced Power Strip;
- (1) Bathroom Faucet Aerator (1.0 GPM)
- (1) Kitchen Faucet Aerator (1.5 GPM)
- (1) Low-Flow Showerhead (1.50 GPM)

In addition to reviewing the tracking data and the project documentation, the Evaluator also reviewed student survey responses provided by AM Conservation to determine appropriate measure-level in-service rates (ISRs), advanced power strip percent peripheral usage, and water heater fuel mix. The following tables outline the impacts applied to the LivingWise desk review.

TABLE 4-9 LIVINGWISE MEASURE-LEVEL ISRS

Measure	Response – No	Response - Yes	ISR
Advanced Power Strip	174	221	55.9%
Bath Aerator (1.0 GPM)	273	122	30.9%
Kitchen Aerator (1.5 GPM)	279	116	29.4%
Showerhead (1.50 GPM)	207	188	47.6%

TABLE 4-10 LIVINGWISE ADVANCED POWER STRIP PERIPHERAL USAGE

Advanced Power Strip Peripheral Type	Number of Responses	Peripheral Usage %
TV System (Entertainment)	70	18.9%
Computer System (Office)	107	28.9%
Other (Average)	193	52.2%
LivingWise Total	370	100.0%

The Evaluator determined the weighted savings based on the deemed savings for Tier 1 by peripheral usage type as described in the AR TRM v10.0.

TABLE 4-11 LIVINGWISE WATER HEATER FUEL MIX

Water Heater Fuel	Number of Responses	Water Heater Fuel Mix %
Electricity	165	41.8%
Natural Gas	182	46.1%
Propane	48	12.2%
LivingWise Total	395	100.0%

TABLE 4-12 LIVINGWISE MEASURE-LEVEL PER-UNIT SAVINGS

Measure	ISR	Water Heater Electric Fuel %	Ex-Post Gross Energy Savings (kWh) per Unit ¹⁹	Ex-Post Gross Demand Reductions (kW) per Unit
Advanced Power Strip	55.9%	41.8%	175.56	0.02
Bath Aerator (1.0 GPM)	30.9%	41.8%	57.75	0.01
Kitchen Aerator (1.5 GPM)	29.4%	41.8%	34.61	0.004
Showerhead (1.50 GPM)	47.6%	41.8%	308.79	0.03
LivingWise Total	-	-	576.71	0.06
Sums may differ due to rounding.				

The ex-post annual and lifetime energy (kWh) saving impacts are summarized in Table 4-13 and Table 4-14.

TABLE 4-13 LIVING WISE® SCHOOL OUTREACH ANNUAL SAVINGS SUMMARY

Measure	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)
Advanced Power Strip	175,333	145,372	82.9%	20.15	16.61	82.4%
Bath Aerator (1.0 GPM)	17,052	11,027	64.7%	1.77	1.15	64.7%
Kitchen Aerator (1.5 GPM)	11,384	6,284	55.2%	1.18	0.65	55.2%
Showerhead (1.50 GPM)	110,874	90,860	81.9%	11.53	9.45	81.9%
LivingWise Total	314,643	253,543	80.6%	34.64	27.86	80.4%
Sums may differ due to rounding.						

¹⁹ These per-unit kWh savings reflect per-unit savings before impacts applied

TABLE 4-14 LIVING WISE® SCHOOL OUTREACH LIFETIME SAVINGS SUMMARY

Measure	Ex-Post Gross Energy Savings (kWh)	EUL	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Advanced Power Strip	145,372	10	1,453,720	1,453,720
Bathroom Aerator (1.0 GPM)	11,027	10	110,270	110,270
Kitchen Aerator (1.5 GPM)	6,284	10	62,838	62,838
Low-Flow Showerhead (1.5 GPM)	90,860	10	908,599	908,599
LivingWise Total	253,543	10	2,535,428	2,535,428
Sums may differ due to rounding.				

4.4.1.2.1 DISCUSSION OF REALIZATION RATES

The measure-level realization rates are low due to the student survey results. Compared to PY2024, the measure-level ISRs and the water heater fuel mix for electric water heaters were lower to the rates found in PY2025. Table 4-15 summarizes the impact differences between the two evaluation years.

TABLE 4-15 LIVINGWISE IMPACT COMPARISONS

LivingWise Measure	PY2024 Water Heater Electric Fuel %	PY2025 Water Heater Electric Fuel %	PY2024 ISR	PY2025 ISR
Advanced Power Strip	NA	NA	65.8%	55.9%
Bathroom Aerator (1.0 GPM)	56.9%	41.8%	42.5%	30.9%
Kitchen Aerator (1.5 GPM)	56.9%	41.8%	42.4%	29.4%
Low-Flow Showerhead (1.5 GPM)	56.9%	41.8%	46.4%	47.6%

4.4.1.3 HVAC Replacement and Tune-up (HVAC)

The ex-post annual and lifetime energy (kWh) saving impacts are summarized in Table 4-16 and Table 4-17.

TABLE 4-16 RESIDENTIAL HVAC ANNUAL SAVINGS SUMMARY

Measure	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)
Central AC Replacement	7,331	7,309	99.7%	1.46	2.86	195.9%
Central AC Tune-up: M&V	15,438	15,447	100.1%	9.38	9.41	100.3%
Central AC Tune-up: Modeled	98,954	98,948	100.0%	60.12	60.25	100.2%
Central HP Replacement	13,945	14,862	106.6%	0.16	1.44	900.7%
Central HP Tune-up: M&V	18,160	18,152	100.0%	3.89	3.89	100.1%
Central HP Tune-up: Modeled	110,195	113,039	102.6%	26.33	27.00	102.6%
Residential HVAC Total	264,023	267,756	101.4%	101.34	104.85	103.5%
Sums may differ due to rounding.						

TABLE 4-17 RESIDENTIAL HVAC LIFETIME SAVINGS SUMMARY

Measure	Ex-Post Gross Energy Savings (kWh)	EUL	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Central AC Replacement	7,309	25	182,716	182,716
Central AC Tune-up: M&V	15,447	7	110,273	99,246
Central AC Tune-up: Modeled	98,948	5	492,624	443,362
Central HP Replacement	14,862	8	111,816	111,816
Central HP Tune-up: M&V	18,152	8	137,296	123,567
Central HP Tune-up: Modeled	113,039	5	557,828	502,046
Residential HVAC Total	267,756	6	1,592,555	1,462,753
Sums may differ due to rounding.				

4.4.1.3.1 DISCUSSION OF REALIZATION RATES

Overall, the Residential HVAC channel central AC and central HP replacement projects had differences in assumptions between the ex-ante and ex-post calculations. The kW realization rates are significantly higher due to differences in baseline EER2 assumptions. For rebated units rated 15.2 SEER2 or higher, the EER2 baseline drops to 9.8 EER2, per the AR TRM v10.0 methodologies for central AC and central HP replacements.

Program staff acknowledged and are aware of the discrepancies in their calculations and are working to revise their calculations. Program staff communicated that the calculation revisions would not be implemented in PY2025. Revisions are anticipated to be implemented in PY2026.

4.4.1.4 Consumer Product Solutions

The ex-post annual and lifetime energy saving impacts are summarized in Table 4-18 and Table 4-19.

TABLE 4-18 CONSUMER PRODUCT SOLUTIONS ANNUAL SAVINGS SUMMARY

Measure	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)
Advanced Power Strip	354,264	354,264	100.0%	47.58	40.21	84.5%
Air Purifier	18,437	18,897	102.5%	2.12	2.17	102.6%
Dehumidifier	9,248	15,790	170.7%	2.10	3.48	165.8%
LED Lamp (Food Bank)	484,364	247,370	51.1%	67.60	40.22	59.5%
Outlet Gasket (Kit)	84,031	84,012	100.0%	43.24	43.25	100.0%
Smart Thermostat	12,745	12,617	99.0%	0.00	0.00	100.0%
Water Cooler	2,891	2,958	102.3%	0.32	0.33	102.7%
Weather Stripping	44,194	44,185	100.0%	22.75	26.76	117.6%
Window AC	46,654	48,452	103.9%	55.58	60.07	108.1%
CPS Total	1,056,827	828,544	78.4%	241.29	216.49	89.7%
Sums may differ due to rounding.						

TABLE 4-19 CONSUMER PRODUCT SOLUTIONS LIFETIME SAVINGS SUMMARY

Measure	Ex-Post Gross Energy Savings (kWh)	EUL	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Advanced Power Strip	354,264	10	3,542,636	3,249,778
Air Purifier	18,897	9	170,073	143,711
Dehumidifier	15,790	12	189,481	150,637
LED Lamp (Food Bank)	247,370	13	3,092,126	3,092,126
Outlet Gasket (Kit)	84,012	15	1,260,185	1,260,185
Smart Thermostat	12,617	11	138,790	111,205
Water Cooler	2,958	10	29,576	20,703
Weather Stripping	44,185	15	662,769	662,769
Window AC	48,452	11	508,744	407,631
CPS Total	828,544	12	9,594,379	9,098,746
Sums may differ due to rounding.				

4.4.1.4.1 DISCUSSION OF REALIZATION RATES

Overall, most of the measures had realization rates that hovered at or near 100% apart from dehumidifiers and Food Bank LED lamps.

The Evaluator reviewed make and model numbers for each of the rebated dehumidifiers through the ENERGY STAR database and utilized the unit-specific specifications to calculate energy savings. The Evaluator was unable to recreate the ex-ante savings, as the claimed savings did not align with the deemed savings by capacity range provided in the AR TRM v10.0.

As for the Food Bank LED lamps, there were a few discrepancies in calculation assumptions that resulted in overinflated ex-ante estimations. Program staff acknowledged and are aware of the discrepancies in their calculations and have revised their calculations. Program staff communicated that the calculation revisions would not be implemented in PY2025. Revisions are anticipated to be implemented in PY2026.

4.4.1.5 Positive Energy Homes

The ex-post annual and lifetime energy saving impacts are summarized in Table 4-20 and Table 4-21.

TABLE 4-20 POSITIVE ENERGY HOMES ANNUAL SAVINGS SUMMARY

Measure	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)
Advanced Power Strip	15,632	15,303	97.9%	1.85	1.82	97.9%
Ceiling Data	0	0	100.0%	0.00	0.00	100.0%
Clothes Dryer	795	647	81.4%	0.08	0.07	82.0%
Clothes Washer	840	822	97.9%	0.20	0.19	97.9%
Dishwasher	2,359	2,309	97.9%	0.16	0.16	99.7%
Door Data	0	0	100.0%	0.00	0.00	100.0%
Ducts Conditioned	0	0	100.0%	0.00	0.00	100.0%
Ducts Unconditioned	0	0	100.0%	0.00	0.00	100.0%
Foundation Data	0	0	100.0%	0.00	0.00	100.0%
HERS	150,820	144,078	95.5%	26.46	24.26	91.7%
HERS Cooling	0	0	100.0%	0.00	0.00	100.0%
HERS Heating	0	0	100.0%	0.00	0.00	100.0%
HERS Hot Water	0	0	100.0%	0.00	0.00	100.0%
HERS Inspection	0	0	100.0%	0.00	0.00	100.0%
HERS Lights and Appliances	0	0	100.0%	0.00	0.00	100.0%
Refrigerator	1,099	867	78.9%	0.13	0.13	100.7%
Smart Thermostat	14,612	13,962	95.6%	0.00	0.00	100.0%
Ventilation Fan	1,679	215	12.8%	2.04	0.03	1.3%
Wall Data	0	0	100.0%	0.00	0.00	100.0%
Window Data	0	0	100.0%	0.00	0.00	100.0%
PEH Total	187,835	178,205	94.9%	30.91	26.65	86.2%
Sums may differ due to rounding.						

TABLE 4-21 POSITIVE ENERGY HOMES LIFETIME SAVINGS SUMMARY

Measure	Ex-Post Gross Energy Savings (kWh)	EUL	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Advanced Power Strip	15,303	10	153,034	153,034
Ceiling Data	0	1	0	0
Clothes Dryer	647	14	9,060	9,060
Clothes Washer	822	14	11,513	11,513
Dishwasher	2,309	15	34,642	34,642
Door Data	0	1	0	0
Ducts Conditioned	0	1	0	0
Ducts Unconditioned	0	1	0	0
Foundation Data	0	1	0	0
HERS	144,078	23	3,241,751	3,241,751
HERS Cooling	0	1	0	0
HERS Heating	0	1	0	0
HERS Hot Water	0	1	0	0
HERS Inspection	0	1	0	0
HERS Lights and Appliances	0	1	0	0
Refrigerator	867	17	14,746	14,746
Smart Thermostat	13,962	11	153,581	153,581
Ventilation Fan	215	19	4,086	4,086
Wall Data	0	1	0	0
Window Data	0	1	0	0
PEH Total	178,205	20	3,622,413	3,622,413
Sums may differ due to rounding.				

4.4.1.5.1 DISCUSSION OF REALIZATION RATES

Overall, most of the measures had realization rates at or near 100%, except for refrigerators and ventilation fans.

The Evaluator reviewed make and model numbers for each of the rebated refrigerators through the ENERGY STAR database and utilized the unit-specific configurations and volume capacities to calculate energy savings. The Evaluator was unable to recreate the ex-ante savings, as the claimed savings did not align with savings based on refrigerator configurations.

Additionally, the Evaluator reviewed models for each of the ventilation fans and calculated energy savings and demand reductions utilizing unit-specific efficacies. Most of the rebated units had rated efficacies of 3.3 (CFM/W), significantly lower than what the ex-ante estimations assumed. This resulted in fewer realized ex-post savings for the ventilation fans.

4.4.2 Net Impact Findings

This section summarizes the results of the evaluation of net impacts.

Details on the methods and values used to estimate net savings are presented in Section 3.1.2.1.

4.4.2.1 Free-ridership and Spillover Findings

As discussed in Section 3.1.2, the Evaluator used responses to participant surveys to develop net savings for the PEH component of HEEP. Historical values and literature review results were used for the other channels.

TABLE 4-22 SUMMARY OF NET SAVINGS DATA COLLECTION

Program	Channel	Type of Data Collection	Ex-Post Net Energy Savings (kWh)	Net-to-Gross Ratio	Population Targeted	Number of Surveys Completed	Absolute Precision (90% Conf.Level)
HEEP	PEH	Participant Survey	178,205	100.0%	6	2	NA

The table below summarizes the estimated free-ridership, spillover, and net-to-gross ratios for the estimates developed through self-report.

TABLE 4-23 SUMMARY OF FREE-RIDERSHIP, SPILLOVER, AND NET-TO-GROSS RATIOS DEVELOPED THROUGH SELF REPORT

Channel	Free-Ridership	Spillover	NTG Ratio
PEH	0.0%	0.0%	100.0%

4.4.2.2 Net Impacts by Channel

Table 4-24 and Table 4-25 summarize the gross and net impacts by channels for HEEP.

TABLE 4-24 GROSS EX-POST AND NET EX-POST KWH BY CHANNEL

Channel	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	NTG Ratio (kWh)	Ex-Post Net Energy Savings (kWh)
Consumer Products	1,056,827	828,544	78.4%	94.1%	780,068
Residential HVAC	264,023	267,756	101.4%	90.8%	243,197
Residential Solutions	1,667,973	1,684,512	101.0%	99.9%	1,682,782
LivingWise - School Kits	314,643	253,543	80.6%	100.0%	253,543
Positive Energy Homes	187,835	178,205	94.9%	100.0%	178,205
HEEP Total	3,491,302	3,212,560	92.0%	97.7%	3,137,794

Sums may differ due to rounding.

TABLE 4-25 GROSS EX-POST AND NET EX-POST KW BY CHANNEL

Channel	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)	NTG Ratio (kW)	Ex-Post Net Demand Reduction (kW)
Consumer Products	241.29	216.49	89.7%	92.4%	200.08
Residential HVAC	101.34	104.85	103.5%	90.4%	94.80
Residential Solutions	250.22	263.99	105.5%	99.9%	263.63
LivingWise - School Kits	34.64	27.86	80.4%	100.0%	27.86
Positive Energy Homes	30.91	26.65	86.2%	100.0%	26.65
HEEP Total	658.40	639.85	97.2%	95.8%	613.02

Sums may differ due to rounding.

4.4.3 Non-Energy Benefits Findings

Protocol L of the AR TRM v10.0 states that EM&V of demand-side management (DSM) programs in Arkansas must account for non-energy benefits (NEBs) resulting from each program. Specifically, the categories of NEBs that are to be calculated for each DSM program are as follows:

- Benefits of electricity, natural gas, and liquid propane energy savings (i.e., other fuels);
- Benefits of public water and wastewater savings; and
- Benefits of avoided and deferred equipment replacement costs.

As discussed below, the NEBs applicable to the HEEP are avoided replacement costs, natural gas (therms) savings, water savings, and propane savings. Section 3.1.3 discusses the methods used to calculate the NEBs.

Measures with zero entries are included to ensure consistency of table structure and to demonstrate that no measures or potential energy and non-energy impacts were omitted.

4.4.3.1 NEB Summary

The tables below summarize the HEEP NEBs.

TABLE 4-26 SUMMARY OF HEEP PROGRAM EX-POST GROSS NEB BY CHANNEL AND MEASURE

Channel / Measure	Ex-Post Gross ARCs (\$)	Ex-Post Gross Natural Gas Savings (therms)	Ex-Post Gross Water Savings (gal)	Ex-Post Gross Propane Savings (gal)
Consumer Products	\$23,204	-1,204	0	0
Advanced Power Strip	\$0	0	0	0
Air Purifier	\$0	0	0	0
Dehumidifier	\$0	0	0	0
LED Lamp (Food Bank)	\$23,204	-1,607	0	0
Outlet Gasket (Kit)	\$0	0	0	0
Smart Thermostat	\$0	403	0	0
Water Cooler	\$0	0	0	0
Weather Stripping	\$0	0	0	0
Window AC	\$0	0	0	0
Residential HVAC	\$0	0	0	0
Central AC Replacement	\$0	0	0	0
Central AC Tune-up: M&V	\$0	0	0	0
Central AC Tune-up: Modeled	\$0	0	0	0
Central HP Replacement	\$0	0	0	0
Central HP Tune-up: M&V	\$0	0	0	0
Central HP Tune-up: Modeled	\$0	0	0	0
Residential Solutions	\$728	51,842	323,093	0
Advanced Power Strip	\$0	0	0	0
Advanced Power Strip (MF)	\$0	0	0	0
Air Infiltration (MF)	\$0	10,957	0	0
Apartment Fee	\$0	0	0	0
Assessment	\$0	0	0	0
Duct Sealing (MF)	\$0	40,464	0	0
Faucet Aerator (MF)	\$0	0	129,240	0
LED Lamp (MF) (Standard)	\$503	0	0	0

Channel / Measure	Ex-Post Gross ARCs (\$)	Ex-Post Gross Natural Gas Savings (therms)	Ex-Post Gross Water Savings (gal)	Ex-Post Gross Propane Savings (gal)
LED Lamp (Standard)	\$225	-16	0	0
Low-Flow Showerhead (MF)	\$0	0	193,853	0
Pool Pump	\$0	0	0	0
Window	\$0	436	0	0
LivingWise® Schools Outreach	\$0	5,050	2,580,393	675
Advanced Power Strip	\$0	0	0	0
Bathroom Aerator (1.0 GPM)	\$0	515	273,811	69
Kitchen Aerator (1.5 GPM)	\$0	293	156,033	39
Low-Flow Showerhead (1.5 GPM)	\$0	4,242	2,150,549	567
Positive Energy Homes	\$0	153	14,440	0
Advanced Power Strip	\$0	0	0	0
Ceiling Data	\$0	0	0	0
Clothes Dryer	\$0	4	0	0
Clothes Washer	\$0	1	14,440	0
Dishwasher	\$0	14	0	0
Door Data	\$0	0	0	0
Ducts Conditioned	\$0	0	0	0
Ducts Unconditioned	\$0	0	0	0
Foundation Data	\$0	0	0	0
HERS	\$0	0	0	0
HERS Cooling	\$0	0	0	0
HERS Heating	\$0	0	0	0
HERS Hot Water	\$0	0	0	0
HERS Inspection	\$0	0	0	0
HERS Lights and Appliances	\$0	0	0	0
Refrigerator	\$0	0	0	0
Smart Thermostat	\$0	134	0	0
Ventilation Fan	\$0	0	0	0
Wall Data	\$0	0	0	0
Window Data	\$0	0	0	0
HEEP Total	\$23,932	55,842	2,917,926	675
Sums may differ due to rounding.				

TABLE 4-27 SUMMARY OF HEEP EX-POST NET NEB BY CHANNEL AND MEASURE

Channel / Measure	Ex-Post Net ARCs (\$)	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water Savings (gal)	Ex-Post Net Propane Savings (gal)
Consumer Products	\$23,204	-1,284	0	0
Advanced Power Strip	\$0	0	0	0
Air Purifier	\$0	0	0	0
Dehumidifier	\$0	0	0	0
LED Lamp (Food Bank)	\$23,204	-1,607	0	0
Outlet Gasket (Kit)	\$0	0	0	0
Smart Thermostat	\$0	323	0	0
Water Cooler	\$0	0	0	0

Channel / Measure	Ex-Post Net ARCs (\$)	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water Savings (gal)	Ex-Post Net Propane Savings (gal)
Weather Stripping	\$0	0	0	0
Window AC	\$0	0	0	0
Residential HVAC	\$0	0	0	0
Central AC Replacement	\$0	0	0	0
Central AC Tune-up: M&V	\$0	0	0	0
Central AC Tune-up: Modeled	\$0	0	0	0
Central HP Replacement	\$0	0	0	0
Central HP Tune-up: M&V	\$0	0	0	0
Central HP Tune-up: Modeled	\$0	0	0	0
Residential Solutions	\$728	51,842	323,093	0
Advanced Power Strip	\$0	0	0	0
Advanced Power Strip (MF)	\$0	0	0	0
Air Infiltration (MF)	\$0	10,957	0	0
Apartment Fee	\$0	0	0	0
Assessment	\$0	0	0	0
Duct Sealing (MF)	\$0	40,464	0	0
Faucet Aerator (MF)	\$0	0	129,240	0
LED Lamp (MF) (Standard)	\$503	0	0	0
LED Lamp (Standard)	\$225	-16	0	0
Low-Flow Showerhead (MF)	\$0	0	193,853	0
Pool Pump	\$0	0	0	0
Window	\$0	436	0	0
LivingWise® Schools Outreach	\$0	5,050	2,580,393	675
Advanced Power Strip	\$0	0	0	0
Bathroom Aerator (1.0 GPM)	\$0	515	273,811	69
Kitchen Aerator (1.5 GPM)	\$0	293	156,033	39
Low-Flow Showerhead (1.5 GPM)	\$0	4,242	2,150,549	567
Positive Energy Homes	\$0	153	14,440	0
Advanced Power Strip	\$0	0	0	0
Ceiling Data	\$0	0	0	0
Clothes Dryer	\$0	4	0	0
Clothes Washer	\$0	1	14,440	0
Dishwasher	\$0	14	0	0
Door Data	\$0	0	0	0
Ducts Conditioned	\$0	0	0	0
Ducts Unconditioned	\$0	0	0	0
Foundation Data	\$0	0	0	0
HERS	\$0	0	0	0
HERS Cooling	\$0	0	0	0
HERS Heating	\$0	0	0	0
HERS Hot Water	\$0	0	0	0
HERS Inspection	\$0	0	0	0
HERS Lights and Appliances	\$0	0	0	0
Refrigerator	\$0	0	0	0
Smart Thermostat	\$0	134	0	0
Ventilation Fan	\$0	0	0	0
Wall Data	\$0	0	0	0

Channel / Measure	Ex-Post Net ARCs (\$)	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water Savings (gal)	Ex-Post Net Propane Savings (gal)
Window Data	\$0	0	0	0
HEEP Total	\$23,932	55,762	2,917,926	675
Sums may differ due to rounding.				

TABLE 4-28 SUMMARY OF HEEP NPV OF NEB

Channel	NPV NGS (\$)	NPV LPGS (\$)	NPV Water (\$)	NPV ARC (\$)	NPV DRC (\$)
Consumer Products	-\$6,449	\$0	\$0	\$23,204	\$0
Residential HVAC	\$0	\$0	\$0	\$0	\$0
Residential Solutions	\$335,184	\$0	\$25,875	\$728	\$0
LivingWise - School Kits	\$20,280	\$12,685	\$206,656	\$0	\$0
Positive Energy Homes	\$682	\$0	\$1,481	\$0	\$0
HEEP Total	\$349,697	\$12,685	\$234,012	\$23,932	\$0
Sums may differ due to rounding.					

4.4.4 Process Evaluation Findings

4.4.4.1 PEH Homes Builder Survey

The Evaluator completed a survey of participants in the Positive Energy Homes program. Two respondents completed the survey and the feedback obtained is summarized below.

Responses indicate strong engagement and satisfaction with the OG&E Positive Energy Homes program among the two participating builders. Both respondents actively promote the program and view its features as advantageous in marketing homes.

Most buyers sign contracts after the home is completed, although one respondent reported a mix of pre-sold and spec homes. Energy efficiency plays a meaningful role in buyer decisions: one respondent rated energy costs as “moderately important,” while the other rated them “extremely important.” Among those who answered, one respondent estimated that 26–50% of buyers requested energy-efficient features in the past year.

Both respondents actively promote the OG&E Positive Energy certification, primarily through yard signage and verbal sales pitches. One respondent also includes the certification logo on purchase contracts. No respondents reported using brochures, websites, MLS listings, or social media for promotion, suggesting limited use of digital or printed marketing materials.

Neither respondent expects changes in the number of homes built to OG&E standards over the next 12 months. Both rated the independent HERS rating as a “great advantage” in selling homes.

Program engagement and satisfaction were uniformly high. Both respondents attended program-related events and rated the information provided as “very useful.” Both respondents also rated their satisfaction at the highest level (“extremely satisfied”) across all aspects, including interactions with staff, outreach, paperwork, incentives, timing of incentives, the HERS process, and the program overall.

4.4.4.2 PEH Secondary Literature Review

Across the United States, electric and gas utilities administer residential new construction programs intended to promote higher-efficiency homebuilding practices. While program structures and priorities vary by jurisdiction, many share common elements, including alignment with the EPA's ENERGY STAR Residential New Construction framework, financial incentives for participating builders, third-party verification by certified Home Energy Rating System (HERS) raters, and standardized branding used to distinguish participating homes in the market.²⁰ This review examines programs from Oklahoma, Oregon, Washington, California, Pennsylvania, Maryland, New Jersey, Minnesota, and Arizona, using Oklahoma Gas & Electric's Positive Energy Home initiative as a central reference point.

The ENERGY STAR Residential New Construction program, administered by the U.S. Environmental Protection Agency, serves as a common reference standard for many utility-sponsored new home programs. Certified homes are required to exceed local building energy codes by at least 10 percent, based on a systems-based approach that evaluates the building envelope, mechanical systems, and overall energy performance. Compliance is verified by independent HERS raters through blower-door testing, duct leakage testing, and on-site inspections, with each home assigned a HERS Index score, where 100 represents a code-minimum home and lower scores indicate lower modeled energy use. ENERGY STAR certification is generally associated with homes modeled to achieve approximately 20 percent energy savings relative to a typical new home built to minimum code requirements.

Many utility programs either require ENERGY STAR certification as a baseline condition or incorporate it as a higher-tier performance threshold. FirstEnergy's Pennsylvania New Homes Program provides an example of this structure. Under this program, builders earn \$0.30 per kWh of annual energy savings for homes that exceed the 2018 IECC by at least 15 percent, with the incentive increasing to \$0.35 per kWh for homes that additionally achieve ENERGY STAR v3.2 certification. Total incentives are capped by building type, ranging from \$1,000 for multifamily units to \$2,500 for single-family detached homes. By linking incentive amounts to modeled energy savings rather than offering flat rebates, the program scales payments with the level of efficiency achieved, while providing an incremental premium for third-party certification. This combination of performance-based incentives with certification-based tiers reflects a structure commonly observed across residential new construction programs.

4.4.4.2.1 REGIONAL PROGRAMS

Pacific Northwest

Energy-efficient new homes programs in the Pacific Northwest are supported by regional coordination through the Northwest Energy Efficiency Alliance (NEEA) and its BetterBuiltNW platform, which aggregates utility program resources across Oregon, Washington, Idaho, and Montana.²¹

In Oregon, Energy Trust administers the EPS™ New Homes program, which is based on the state's Energy Performance Score (EPS). Under this program, third-party verifiers conduct testing of air leakage, duct tightness, and selected construction features to generate an EPS score on a 0 to 200+ scale, where lower

20 U.S. Environmental Protection Agency. ENERGY STAR Residential New Construction Program. https://www.energystar.gov/partner-resources/residential_new

21 BetterBuiltNW / Northwest Energy Efficiency Alliance. BetterBuiltNW Resource Hub. <https://betterbuiltinw.com>

scores indicate lower modeled energy use. Homebuyers receive an EPS scorecard prior to purchase that includes estimated utility costs. EPS homes are also required to meet solar-ready specifications related to roof orientation and design.^{22,23}

In Washington, Puget Sound Energy's Next Level Homes program offers two participation pathways. The Energy Credits+ pathway provides incentives to builders for exceeding Washington State Energy Code requirements through specified efficiency measures, such as enhanced insulation, advanced framing, or improved airtightness, with incentives ranging from \$215 to \$530 per 0.5 energy credits above code, along with additional per-feature incentives. The Certified Performance pathway offers incentives of \$260 to \$620 per home for ENERGY STAR certification and up to \$1,580 per home for DOE Zero Energy Ready Home certification, with additional incentives available for select high-efficiency features. Both pathways include higher Building Opportunity incentives for homes constructed on income-qualified community land trust or reservation land.²⁴

California and Arizona

Southern California Gas administers the Energy Efficient New Homes program, which offers rebates to builders of new single-family and multifamily projects that exceed California's Title 24 Building Energy Efficiency Standards and install qualifying natural gas appliances. Rebates are tied to specific equipment — high-efficiency furnaces, water heating systems, heat recovery ventilators, and clothes washers — with larger rebates for higher efficiency ratings. Bonus incentives are available for projects that additionally achieve ENERGY STAR certification (\$40 per single-family unit), LEED designation, or EPA WaterSense labeling. Applications must be submitted and approved before construction begins, with funds reserved on a first-come, first-served basis.²⁵

Arizona Public Service's Residential New Construction Program offered builder incentives for homes meeting EPA ENERGY STAR version 3 certification — \$270 per home for all-electric builds and \$200 for dual-fuel homes — with additional rebates for connected electric water heaters, HVAC ducting in conditioned spaces, and EV Ready pre-wiring. A proposed \$1,000 per home NextGen tier targeted homes meeting more rigorous standards with 10% greater efficiency savings. The program was discontinued as of January 1, 2026, per Arizona Corporation Commission Decision No. 81584, though homes achieving ENERGY STAR certification by December 31, 2025 remained eligible for incentives with paperwork due within 180 days of certification.²⁶

22 Energy Trust of Oregon. EPS New Homes Program. <https://rebates.energy.gov> (program details); Residential: EPS New Homes: Say Hello to EPS - Energy Trust of Oregon

23 Home Building Association of Greater Portland. Homes of Tomorrow Today Tour. <https://www.homesoftomorrowpdx.com>

24 Puget Sound Energy. (n.d.). Next Level Homes. <https://psenextlevelhomes.com/#top>

25 Southern California Gas Company. (2025). Energy Efficient New Homes Program guidebook. <https://www.socalgas.com/sites/default/files/2025-09/SoCalGas-Energy-Efficient-New-Homes-Program-Guidebook-2025.pdf>

26 Arizona Public Service. Residential ENERGY STAR® New Homes Program. <https://www.aps.com/en/Residential/Save-Money-and-Energy/New-Homes>

Midwest

Minnesota Power's New Construction Rebate Program reflects the particular demands of a cold climate. Designed for homeowners building new homes heated primarily with electricity, it pairs participants with a utility Energy Advisor from initial planning through completion. The program includes an optional mid-construction inspection with a free blower-door test conducted before drywall goes up, allowing air leaks to be identified and corrected while they are still accessible. A final inspection using blower-door and thermal imaging equipment measures the home's efficiency and calculates the rebate. Total incentives available through the program exceed \$4,000 per home.²⁷

Mid-Atlantic and Northeast

FirstEnergy's Pennsylvania New Homes Program offers builder incentives across four subsidiary utilities — Met-Ed, Penelec, Penn Power, and West Penn Power. Its incentive structure is performance-based: homes exceeding the 2018 IECC code by at least 15% earn \$0.30 per kWh saved, rising to \$0.35 per kWh for homes that additionally achieve ENERGY STAR v3.2 certification. A separate low-income housing tier pays \$0.33 and \$0.38 per kWh respectively for homes occupied by residents earning no more than 150% of the federal poverty guideline. Incentive caps vary by building type, from \$1,000 per unit for multifamily apartments and condos to \$2,500 for single-family detached homes, with an additional \$50 bonus for an ENERGY STAR certified smart thermostat. All homes must be verified by a certified HERS rater, and the program is available for qualifying homes through May 31, 2026.²⁸

Maryland's EmPOWER Maryland legislation requires each major utility in the state to operate a new homes program. Potomac Edison's program offers tiered flat rebates for homes with 100% LED lighting installed — ranging from \$1,200 for single-family homes meeting the Code Plus tier (which replaced ENERGY STAR v3.1 effective July 2025) to \$1,900 for ENERGY STAR v3.2 certification. Homes achieving ENERGY STAR NextGen status receive an additional \$3,000 premium on top of the v3.2 rebate, bringing the total to \$4,900 for a single-family detached home, though NextGen rebates cannot be combined with other additive measure incentives. The program supplements whole-home rebates with measure-specific incentives for heat pumps (\$450–\$3,200 depending on efficiency tier), heat pump water heaters (\$1,500), ENERGY STAR air conditioners (\$200), smart thermostats (\$75), and quality HVAC installations (\$150). A modest \$20 incentive is extended to HERS raters to encourage thorough participation.²⁹

In October 2025, the New Jersey Board of Public Utilities launched the New Construction Program (NCP), consolidating a patchwork of prior initiatives into a single statewide gateway. The NCP offers three participation pathways, Bundled, Streamlined, and High-Performance:

27 Minnesota Power. New Construction Energy Efficiency Rebate Program. <https://www.mnpower.com/ProgramsRebates/residentialnewconstruction>

28 FirstEnergy Corp. Energy Efficient New Homes Program — Pennsylvania Financial Incentives (June 2024). <https://energysavepa-newhomes.com>

29 FirstEnergy Corp. (n.d.). New home construction: Potomac Edison New Homes Program. https://www.firstenergycorp.com/save_energy/save_energy_maryland/for_your_business/new_home_construction.html

- The Streamlined Pathway is designed for relatively straightforward projects that incorporate a limited set of energy efficiency measures. It emphasizes ease of participation and reduced administrative requirements, making it suitable for smaller or less complex new construction and major renovation projects. Incentives under this pathway are generally tied to the installation of qualifying measures rather than whole-building performance outcomes.
- The Bundled Pathway targets projects that implement multiple energy conservation measures as part of a coordinated package. This pathway is primarily oriented toward commercial and industrial buildings and requires participants to demonstrate that a defined bundle of measures has been installed. Incentives are structured to encourage broader efficiency improvements across building systems without requiring achievement of an external certification or whole-building performance rating.
- The High-Performance Pathway supports projects pursuing advanced efficiency outcomes verified through nationally recognized building certifications. Eligible certifications include ENERGY STAR, LEED v4.1, and Phius (Passive House Institute US). Under this pathway, incentives range from \$1.00 per square foot for ENERGY STAR or LEED v4.1-certified buildings to \$2.50 per square foot for projects achieving Phius certification, with higher incentive levels associated with more stringent performance thresholds. This pathway typically involves more extensive documentation and third-party verification and is intended for projects designed to exceed standard code-based efficiency approaches.

In addition to pathway-specific incentives, the NCP offers supplemental incentives for projects that reduce greenhouse gas emissions, incorporate all-electric or heat pump systems, support affordable housing, or serve industrial and high-energy-intensity buildings located in priority zones. The program also includes workforce development reimbursements of up to \$2,000 per training course for builders, consultants, and raters pursuing high-performance construction credentials.^{30, 31}

4.4.4.2.2 COMPARATIVE PROGRAM SUMMARY

Table 4-29 summarizes core program features across the utilities reviewed.

30 New Jersey Board of Public Utilities. NJBPU Announces New Construction Program (October 28, 2025). <https://www.roi-nj.com/2025/10/28/industry/energy-utilities/njbpu-announces-new-construction-program-incentivizing-energy-efficient-construction/>

31 New Jersey Board of Public Utilities. (n.d.). New Construction Program. New Jersey's Clean Energy Program. Retrieved March 12, 2026, from <https://cleanenergy.nj.gov/programs/energy-efficiency/new-construction-program>

TABLE 4-29 COMPARISON OF UTILITY NEW CONSTRUCTION PROGRAMS

Region/ Utility	Program Name	ENERGY STAR Role	Primary Incentive	Verification	Notable Features
Oklahoma & Arkansas (OG&E)	Positive Energy Home	Meets/ exceeds ES 2010 specs	Per-home rebate; three performance tiers with increasing incentives	Utility experts & HERS raters (CLEAResult)	Branded program; staged blueprint-to-certification process
Oregon (Energy Trust)	EPS™ New Construct- ion	ENERGY STAR basis; EPS rating system	Sliding scale by EPS score	Program- approved EPS verifiers	EPS scorecard for buyers; solar-ready incentives; model home tours
Washington (Puget Sound Energy)	Next Level Homes	ENERGY STAR or DOE ZERH required	Cash incentives per certified home	HERS raters & program verification	Multi-tier certification approach (ENERGY STAR, DOE ZERH); income- qualified / land trust bonus tier
NW Region (NEEA)	BetterBuiltNW (clearing- house)	Promotes ES & DOE ZERH	N/A — resource hub	Supports utility program alignment	Regional collaboration; aligned with BPA standards
Southern CA (SoCalGas & SCE)	Energy Efficient New Homes (EENH)	Exceeds Title 24; ES as reference	Rebates per unit for % above code	CA HERS; Title 24 compliance	Gas appliances only; applications pre- construction; funds reserved 36 months; LEED and WaterSense bonuses available
Pennsylvania (FirstEnergy)	PA Energy Efficient New Homes	ENERGY STAR v3.2 & NextGen tiers	\$0.30– \$0.35/kWh saved; caps by home type	Certified HERS Raters; PA- specific REM/Rate modeling	Smart thermostat bonus (\$50)
Maryland (EmPOWER / Potomac Edison)	New Homes Program (EmPOWER MD)	ENERGY STAR v3.2 & Code Plus tiers	Flat rebates up to \$4,900 (SFH)	HERS Raters; ENERGY STAR checklists	Incentives for equipment (heat pumps, HPWHs, smart thermostats); rater incentive (\$20)
New Jersey (NJBP / NJCEP)	New Construct- ion Program (NCP)	ES, LEED, Phius recognized	\$1.00–\$2.50/sq. ft. by certification level	HERS raters + LEED / Phius certifiers	Unified state program; electrification & workforce training focus
Minnesota (Minnesota Power)	New Construct- ion Rebate Program	Implied ≥20% above code; electric heat focus	Exceeds 4,000/home; plus equipment rebates	Energy Advisor + blower door / thermal imaging	Mid-construction & final inspections; cold-climate heat pump rebates
Arizona (APS)	ENERGY STAR® New Homes (discont- inued)	Directly required ENERGY STAR	Per-home builder incentives (ended Dec 2025)	HERS Raters	Discontinued Jan 2026 per ACC Decision No. 81584

4.4.4.3 Common Themes and Best Practices

Table 4-30 summarizes how the OG&E program design compares with selected peer residential new construction programs across key design dimensions, including program structure, incentive design, technical requirements, verification and quality assurance, and market engagement. The table is intended to provide context on areas where the OG&E design aligns with common practice and where it differs from approaches used in other jurisdictions.

Overall, the OG&E program is generally consistent with common practice in its use of a performance-based, tiered incentive structure, builder-paid rebates, and standard HERS-based verification and QA protocols. The program's structure and delivery model largely align with peer programs, particularly with respect to inspection stages, third-party verification, and builder-focused enrollment. However, relative to benchmarks, the OG&E design includes fewer requirements or incentives tied to third-party certifications, newer energy codes, electrification, or solar-ready provisions. Several features that are increasingly emphasized in other jurisdictions—such as ENERGY STAR alignment, explicit electrification priorities, and certification premiums—are not currently incorporated. These differences reflect a more limited scope in certain technical and market-facing elements compared to many peer programs, while maintaining alignment with established practices for program administration and quality control.

TABLE 4-30 SUMMARY OF BENCHMARKING RESULTS

Category	Dimension	OG&E Design	Benchmark	Notes
Program Structure	Program type	Performance-based tiered by modeled kWh savings	Meets common practice	Similar to PA and NJ performance pathways
	Certification alignment	None required or incentivized	More limited than peers	Most peers include ENERGY STAR or equivalent
	Construction scope	New construction only	Meets common practice	Gut rehab uncommon except NJ
	Multifamily inclusion	Eligible with flat per-unit incentives	Meets common practice	Structure varies across peers
Incentive Design	Incentive recipient	Builder-paid rebates	Meets common practice	Standard delivery point
	Incentive structure	Tiered by savings with size breakpoints	Meets common practice	Performance-based tiers, with separate thresholds by home size
	Measure adders	Bonuses for slab insulation foam encapsulation smart power strips	Less common feature	Some peers use adders but fewer target plug loads
	Certification premium	None	More limited than peers	ES and other certifications common in PA MD NJ WA
Technical Requirements	Performance baseline	Modeled vs 2009 IECC	Less common feature	Peers reference newer codes
	Fuel treatment	Fuel-neutral	Meets common practice	Electrification emphasis increasing elsewhere
	Electrification focus	Not explicitly required	More limited than peers	Many newer programs prioritize heat pumps
	Solar-ready provisions	None specified	More limited than peers	Included in OR EPS and some CA programs

Category	Dimension	OG&E Design	Benchmark	Notes
Verification & QA	Third-party verification	Certified HERS raters	Meets common practice	Standard approach
	Inspection stages	Pre-drywall and final	Meets common practice	Typical HERS protocol
	QA/QC oversight	100% desk review ~10% field QA shadow inspections	Meets common practice	More formalized than many peers
	Multifamily sampling	RESNET sampling available not yet used	Meets common practice	Common early-stage condition
Market Engagement	Builder outreach	Builder-focused enrollment	Meets common practice	Standard model
	Consumer-facing labeling	PEH branding	Meets common practice	EPS ENERGY STAR labels common

4.4.5 Protocol A Database Review

The tracking system in the database conforms reasonably well to the tracking system protocol developed for use in Arkansas. The table below shows a summary of how well the program tracking systems meets the components of the protocol.

TABLE 4-31 HEEP PROTOCOL A SUMMARY

Category	Field	Status	Description of Issue(s)
Participating Customer Information	Unique customer identifier, such as account number	✓	
	Customer contact information – name, mailing address, telephone number	✓	
	Date(s) of major customer milestones such as rebate application date, approval date, rebate processing date, etc.	✓	
Measure-Specific Information	Measure Group (Equipment Type)	✓	
	Equipment Fuel/Energy Source	✓	
	Equipment Quantity	✓	
	Efficiency Level	✓	
	Estimated Savings	✓	
	Estimated incremental measure cost	✗	Incremental cost not shown in tracking data
	Equipment Useful Life	-	Result varies by pathway. EUL present in RSOL. Field is present but blank for CPS, LivingWise, HVAC.
	Measure Name – Text Description	✓	
	Measure Name – Numerical Code	N/A	
	Serial Number	✓	
	Reported age of equipment replaced	✗	Reported age of equipment is often times not included in the provided tracking data.
	Reported measure type of equipment replaced	✓	

Category	Field	Status	Description of Issue(s)
	Other inputs necessary for the use and compliance with the TRM	✓	Some low-volume measures have defaults rather than equipment-specific efficiencies used (such as bathroom ventilation fan CFM) but overall, key parameters present for measures encompassing > 98% of program savings.
Vendor-Specific Information	Name and Contact Information for Contractor	✓	
	Contractor Type	✓	
	Date of Installation	✓	
	Cost of the installed equipment	-	Provided for direct installation measures. Missing for customer-purchased measures.
	Efficiency level of the installed equipment	✓	
Program Tracking Information	Date of the initial program contact/rebate information	✓	
	Date of rebate/incentive paid	✓	
	Incentive amount paid to-date	✓	
	Incentive amounts remaining	✓	
	Application Status (i.e., number of applications approved, pending, or denied)	✓	
	Reason and reason code for application denial	✓	
Program Costs	Overall program budgets	✓	
	Program expenditures to-date	✓	
	Incentive Costs	✓	
	Administrative Costs	✓	
	Marketing/Outreach Costs	✓	
	Evaluation Costs	✓	
Marketing and Outreach Activities	Advertising and marketing spending levels	-	Not itemized from total marketing costs in data provided to the Evaluator.
	Media schedules	N/A	
	Summary of number of community events/outreach activities	✓	
	Other media activities – estimated impressions via mailings, television/radio; print ads.	✓	

4.5 Key Findings and Recommendations

4.5.1 Residential Solutions Channel

Residential Solutions functions primarily as a feeder and complementary channel within the broader residential portfolio rather than a standalone delivery mechanism. Staff described the single-family assessment component as an entry point used to determine eligibility for comprehensive weatherization services, with qualified customers transitioning to CWA. Participation is weighted toward multi-family direct-install measures, with marketing and trade ally support integrated into broader residential outreach efforts.

The Residential Solutions channel achieved 101.0% of expected kWh savings and 105.5% of expected kW reductions. The channel performed well as most of the measures had kWh realization rates that were > 90.0%. The channel measure mix remained mostly unchanged from PY2024, as there was no wall insulation offered in PY2025.

Advanced power strips installed in multifamily dwellings had a slightly lower ISR. Through on-site visit verification, the Evaluator calculated an on-site visit ISR of 66.7%, noting that 2 of the 6 units were not being used. Tenants were provided with the APS units but were not in-use at the time of the visit. The Evaluator aggregated ISRs from literature reviews and historical on-site visits to calculate an ISR to apply. For more details about ISRs applied, please see Section 3.1.1.7.2.

- **Recommendation 1:** Program staff may consider directing trade allies to engage with the multifamily tenants to determine a more permanent installation location and peripherals to provide power to. Trade allies may consider providing assistance to the tenants in setting up the APS unit(s) before moving on to other measures in the home.

4.5.2 LivingWise® Schools Outreach Channel

LivingWise is an education-focused outreach Channel with standardized implementation and data collection processes managed by a third-party implementer. The program delivers energy efficiency education through classroom curriculum and take-home kits, supported by teacher recruitment, bulk kit distribution, and survey-based data collection. Staff reported stable participation and sufficient survey returns.

4.5.3 HVAC Replacement and Tune-Up Channel

The HVAC channel achieved 101.4% of expected kWh savings and 103.5% of expected kW reductions. Overall, the HVAC measures performed well, despite discrepancies in methodologies. There were differences in baseline EER2 assumptions for the central AC/HP replacements that drove the kW realization rates above 100.0%. Program staff are aware of calculation errors and have revised their calculators, noting revised estimations will be implemented in PY2026.

The HVAC channel is delivered through highly standardized protocols with robust training, data capture, and quality assurance requirements. Tune-ups are performed by trained contractors using proprietary diagnostic tools and digital data collection, followed by multi-step review and QA/QC verification. Replacement rebates rely on post-purchase applications with desk reviews and limited on-site verification.

4.5.4 Consumer Product Solutions Channel

The CPS channel achieved 78.4% of expected kWh savings and 89.7% of expected kW reductions. Despite a few measure calculation discrepancies, the channel performed well, achieving 101.5% of expected kWh savings for non-Food Bank LED measures.

Food Bank LED lamps claimed slightly higher per-unit ex-ante estimations in PY2025. There were a few discrepancies in calculation assumptions, namely hours of use, that resulted in overinflated ex-ante estimations and fewer verified ex-post savings. Program staff acknowledged and are aware of the discrepancies in their calculations and have revised their calculations. Revisions are anticipated to be implemented in PY2026.

The Consumer Product Solutions Channel relies primarily on upstream retail incentives supported by consistent retail engagement and invoice-based verification. Most activity occurs through point-of-purchase markdowns at participating retailers, supplemented by limited downstream rebates for smart thermostats. Staff described regular in-store visits, standardized point-of-purchase materials, and multi-level invoice reviews as key mechanisms to ensure compliance and accurate incentive processing.

4.5.5 Positive Energy Homes Channel

The Positive Energy Homes Channel is in an early stage of implementation, with processes and protocols largely established. The program offers tiered incentives based on modeled energy savings, with additional bonuses for high-impact measures such as slab insulation and full foam encapsulation. Multifamily projects are eligible under a flat per-unit incentive structure, though RESNET sampling protocols for multifamily have not yet been applied in Arkansas. Quality assurance is robust, incorporating multiple inspections and desk reviews, but the program pipeline is still developing following an initial pilot phase focused on recruitment and setup.

Verification and QA/QC processes are strong and exceed minimum industry standards. The program employs certified HERS raters, conducts two-stage inspections, performs 100% desk reviews and approximately 10% field QA, and follows RESNET protocols. These practices are comparable to or more rigorous than many peer utilities. For multifamily, RESNET sampling is available but not yet implemented.

Builders participating in the Positive Energy Homes program receive marketing support materials, including flyers for open houses and certificates demonstrating home efficiency. These resources are intended to help builders communicate program participation and energy performance benefits to prospective buyers. Both survey respondents reported that they actively promote the certification, primarily through yard signage and verbal sales pitches. However, marketing efforts are limited to these channels, with no reported use of brochures, websites, MLS listings, or social media.

- **Recommendation 1:** Evaluate builder utilization of provided marketing materials and identify barriers to broader use. Consider offering guidance or additional resources to help builders integrate these materials into their sales strategies. Improving adoption of marketing tools can enhance buyer awareness of energy-efficient homes and increase program visibility.

Program participants expressed extremely high satisfaction with all aspects of the Positive Energy Homes program, including interactions with staff, outreach, paperwork processes, incentives, and overall experience. Both respondents rated every category at the highest level (“extremely satisfied”) and reported that program information provided at events was “very useful.” In addition to these satisfaction ratings, builders emphasized the value of the independent HERS rating, with both respondents indicating it provides a “great advantage” in selling homes. This suggests that the HERS rater’s role not only supports program quality assurance but also enhances the marketability of energy-efficient homes, reinforcing the program’s appeal to builders.

The program employs targeted recruitment strategies, including outreach through homebuilder associations, sponsorship of industry events, and direct engagement with builders identified via association lists and RESNET-provided contacts. These efforts have helped establish a growing pipeline of participants during the program’s early implementation phase.

- **Recommendation 2:** Consider expanding recruitment efforts to increase the number of participating builders. Expanding recruitment through these tactics can broaden the builder pipeline, leverage builder credibility, and increase customer awareness of energy-efficient homes, ultimately supporting program growth. Tactics to achieve this could include:
 - Peer-to-Peer Recruitment: Engage satisfied builders as ambassadors to share success stories and encourage participation.
 - Referral Incentives: Offer recognition or small bonuses for builders who refer others to the program.
 - Digital Outreach: Use targeted online ads, webinars, or virtual information sessions to reach builders not active in associations.
 - Showcase Projects: Develop case studies or short videos highlighting completed Positive Energy Homes to demonstrate program benefits for both builders and prospective homebuyers. If a builder with strong program performance is willing to participate, consider creating a video walkthrough where the builder explains the home's energy-efficient features. This approach not only promotes the program but can also provide additional business opportunities for the featured builder by showcasing their expertise and quality work.

The Positive Energy Homes program design is generally consistent with common practice among benchmarked utility residential new construction programs, particularly in its use of performance-based, tiered incentives, builder-paid rebates, and HERS-based third-party verification. Peer programs similarly rely on modeled energy savings, staged inspections, and standardized QA/QC protocols. However, compared to many benchmark utilities, the OG&E design places less emphasis on ENERGY STAR alignment, certification premiums, electrification, and solar-ready requirements, representing opportunities to expand technical scope and market signaling.

5 Consistent Weatherization Approach (CWA) Program

5.1 Summary

The tables below report ex-ante gross, ex-post gross, ex-post net energy savings (kWh) (both annual and lifetime), demand reductions (kW), participation, incentive spend, and ex-post net NEBs, by channel and measure, where applicable.

TABLE 5-1 CWA ENERGY SAVINGS (kWh)

Channel / Measure	Ex-Ante Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Post Gross Energy Savings (kWh)	NTG (kWh)	Ex-Post Net Energy Savings (kWh)
Weatherization	3,504,799	106.1%	3,717,594	96.0%	3,568,890
Advanced Power Strip	24,211	98.6%	23,874	96.0%	22,919
Air Infiltration	681,946	107.0%	729,692	96.0%	700,505
Assessment	0	100.0%	0	100.0%	0
Ceiling Insulation	766,664	99.9%	765,885	96.0%	735,250
Duct Sealing	1,890,792	108.8%	2,056,319	96.0%	1,974,067
Faucet Aerator	4,054	103.2%	4,182	96.0%	4,015
Health & Safety	0	100.0%	0	100.0%	0
LED Lamp (Specialty)	7,413	101.0%	7,488	96.0%	7,189
LED Lamp (Standard)	34,945	102.1%	35,694	96.0%	34,266
Low-Flow Showerhead	8,475	101.4%	8,592	96.0%	8,248
Smart Thermostat	86,298	99.5%	85,867	96.0%	82,432
Low-Income Weatherization	1,778,513	102.5%	1,822,155	100.0%	1,822,155
Advanced Power Strip	22,446	90.4%	20,290	100.0%	20,290
Advanced Power Strip (Kit)	104,980	100.0%	104,980	100.0%	104,980
Air Infiltration	236,706	106.6%	252,323	100.0%	252,323
Assessment	0	100.0%	0	100.0%	0
Ceiling Insulation	436,615	99.8%	435,860	100.0%	435,860
Duct Sealing	674,108	117.8%	794,021	100.0%	794,021
Faucet Aerator	1,987	99.2%	1,971	100.0%	1,971
Health & Safety	0	100.0%	0	100.0%	0
LED Lamp (Kit) (Standard)	187,032	52.3%	97,868	100.0%	97,868
LED Lamp (Specialty)	4,300	100.9%	4,339	100.0%	4,339
LED Lamp (Standard)	26,241	102.3%	26,854	100.0%	26,854
Low-Flow Showerhead	3,971	92.5%	3,673	100.0%	3,673
Outlet Gasket (Kit)	32,440	100.0%	32,440	100.0%	32,440
Smart Thermostat	30,626	99.5%	30,472	100.0%	30,472
Weather Stripping (Kit)	17,061	100.0%	17,061	100.0%	17,061
CWA Total	5,283,312	104.9%	5,539,748	97.3%	5,391,044
Sums may differ due to rounding.					

TABLE 5-2 CWA DEMAND REDUCTION SUMMARY

Channel / Measure	Ex-Ante Gross Demand Reductions (kW)	Realization Rate (kW)	Ex-Post Gross Demand Reductions (kW)	NTG (kW)	Ex-Post Net Demand Reduction (kW)
Weatherization	864.23	103.5%	894.18	96.0%	858.42
Advanced Power Strip	2.88	98.6%	2.84	96.0%	2.73
Air Infiltration	145.94	107.0%	156.16	96.0%	149.91
Assessment	0.00	100.0%	0.00	100.0%	0.00
Ceiling Insulation	233.08	101.1%	235.65	96.0%	226.22
Duct Sealing	474.46	103.5%	491.30	96.0%	471.65
Faucet Aerator	0.42	103.2%	0.43	96.0%	0.42
Health & Safety	0.00	100.0%	0.00	100.0%	0.00
LED Lamp (Specialty)	1.17	101.0%	1.18	96.0%	1.14
LED Lamp (Standard)	5.40	106.0%	5.72	96.0%	5.49
Low-Flow Showerhead	0.88	101.4%	0.89	96.0%	0.86
Smart Thermostat	0.00	100.0%	0.00	100.0%	0.00
Low-Income Weatherization	445.70	109.9%	489.90	100.0%	489.90
Advanced Power Strip	2.67	90.4%	2.41	100.0%	2.41
Advanced Power Strip (Kit)	14.76	80.7%	11.92	100.0%	11.92
Air Infiltration	64.33	106.7%	68.62	100.0%	68.62
Assessment	0.00	100.0%	0.00	100.0%	0.00
Ceiling Insulation	145.94	100.9%	147.25	100.0%	147.25
Duct Sealing	194.07	108.9%	211.31	100.0%	211.31
Faucet Aerator	0.21	99.2%	0.21	100.0%	0.21
Health & Safety	0.00	100.0%	0.00	100.0%	0.00
LED Lamp (Kit) (Standard)	6.53	243.8%	15.91	100.0%	15.91
LED Lamp (Specialty)	0.67	102.2%	0.68	100.0%	0.68
LED Lamp (Standard)	3.99	104.5%	4.17	100.0%	4.17
Low-Flow Showerhead	0.41	92.5%	0.38	100.0%	0.38
Outlet Gasket (Kit)	3.34	500.1%	16.70	100.0%	16.70
Smart Thermostat	0.00	100.0%	0.00	100.0%	0.00
Weather Stripping (Kit)	8.78	117.6%	10.33	100.0%	10.33
CWA Total	1,309.93	105.7%	1,384.08	97.4%	1,348.31
Sums may differ due to rounding.					

TABLE 5-3 CWA LIFETIME ENERGY SAVINGS (kWh)

Channel / Measure	EUL	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Weatherization	22	80,547,575	77,325,672
Advanced Power Strip	10	238,737	229,188
Air Infiltration	20	14,593,849	14,010,095
Assessment	1	0	0
Ceiling Insulation	30	22,976,547	22,057,485
Duct Sealing	20	41,126,388	39,481,333
Faucet Aerator	10	41,821	40,148
Health & Safety	1	0	0
LED Lamp (Specialty)	13	93,604	89,860
LED Lamp (Standard)	13	446,177	428,330
Low-Flow Showerhead	10	85,921	82,484
Smart Thermostat	11	944,532	906,751
Low-Income Weatherization	21	38,002,828	38,002,828
Advanced Power Strip	10	202,904	202,904
Advanced Power Strip (Kit)	10	1,049,799	1,049,799
Air Infiltration	20	5,046,454	5,046,454
Assessment	1	0	0
Ceiling Insulation	30	13,075,813	13,075,813
Duct Sealing	20	15,880,423	15,880,423
Faucet Aerator	10	19,712	19,712
Health & Safety	1	0	0
LED Lamp (Kit) (Standard)	13	1,223,350	1,223,350
LED Lamp (Specialty)	13	54,238	54,238
LED Lamp (Standard)	13	335,680	335,680
Low-Flow Showerhead	10	36,732	36,732
Outlet Gasket (Kit)	15	486,606	486,606
Smart Thermostat	11	335,197	335,197
Weather Stripping (Kit)	15	255,921	255,921
CWA Total	21	118,550,403	115,328,500
Sums may differ due to rounding.			

TABLE 5-4 CWA COUNT OF MEASURES AND INCENTIVE SPEND

Channel / Measure	Count of Participants ³²	Sum of Measures	Incentive Spend (\$)
Weatherization	917	6,559	\$1,218,542
Advanced Power Strip	78	96	\$2,880
Air Infiltration	552	691	\$113,247
Assessment	840	1,057	\$156,525
Ceiling Insulation	492	617	\$608,227
Duct Sealing	562	761	\$166,720
Faucet Aerator	61	93	\$372
Health & Safety	414	1,324	\$115,628
LED Lamp (Specialty)	54	264	\$1,353
LED Lamp (Standard)	216	1,386	\$6,930
Low-Flow Showerhead	22	28	\$336
Smart Thermostat	107	242	\$46,325
Low-Income Weatherization	515	18,848	\$720,119
Advanced Power Strip	59	89	\$2,670
Advanced Power Strip (Kit)	1	936	\$32,760
Air Infiltration	259	323	\$48,188
Assessment	457	562	\$87,375
Ceiling Insulation	319	389	\$361,876
Duct Sealing	271	345	\$67,201
Faucet Aerator	31	48	\$184
Health & Safety	297	846	\$70,171
LED Lamp (Kit) (Standard)	1	3,744	\$11,232
LED Lamp (Specialty)	25	144	\$771
LED Lamp (Standard)	156	1,006	\$5,030
Low-Flow Showerhead	12	14	\$168
Outlet Gasket (Kit)	1	9,360	\$4,680
Smart Thermostat	48	106	\$20,325
Weather Stripping (Kit)	1	936	\$7,488
CWA Total	1,432	25,407	\$1,938,661
Sums may differ due to rounding.			

32 Count of participants reflect the number of unique participants by an identifiable field found in program tracking data. The Evaluator opted to include measure-level participant counts; however they will not add up to channel-level participant counts.

TABLE 5-5 CWA Ex-POST NET NEB

Channel / Measure	Ex-Post Net ARCs (\$)	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water Savings (gal)	Ex-Post Net Propane Savings (gal)
Weatherization	\$3,924	109,758	125,047	0
Advanced Power Strip	\$0	0	0	0
Air Infiltration	\$0	31,361	0	0
Assessment	\$0	0	0	0
Ceiling Insulation	\$0	15,305	0	0
Duct Sealing	\$0	61,428	0	0
Faucet Aerator	\$0	0	43,495	0
Health & Safety	\$0	0	0	0
LED Lamp (Specialty)	\$693	-17	0	0
LED Lamp (Standard)	\$3,231	-133	0	0
Low-Flow Showerhead	\$0	0	81,552	0
Smart Thermostat	\$0	1,815	0	0
Low-Income Weatherization	\$12,001	54,553	66,974	0
Advanced Power Strip	\$0	0	0	0
Advanced Power Strip (Kit)	\$0	0	0	0
Air Infiltration	\$0	15,491	0	0
Assessment	\$0	0	0	0
Ceiling Insulation	\$0	8,183	0	0
Duct Sealing	\$0	28,490	0	0
Faucet Aerator	\$0	0	24,499	0
Health & Safety	\$0	0	0	0
LED Lamp (Kit) (Standard)	\$9,180	-636	0	0
LED Lamp (Specialty)	\$409	-19	0	0
LED Lamp (Standard)	\$2,411	-98	0	0
Low-Flow Showerhead	\$0	0	42,475	0
Outlet Gasket (Kit)	\$0	0	0	0
Smart Thermostat	\$0	3,143	0	0
Weather Stripping (Kit)	\$0	0	0	0
CWA Total	\$15,925	164,311	192,021	0
Sums may differ due to rounding.				

The subsections of this chapter outline the evaluation approach and findings for each measure and channel of the Consistent Weatherization Approach (CWA) Program.

5.2 CWA Overview

The CWA, administered by CLEAResult under contract to OG&E, provides energy audits and whole house retrofit services to OG&E residential customers. The program is administered with significant coordination with AOG due to their high level of overlap in their service territory.

The program is designed to use both gas utility and electric utility funds to provide in-home audit and energy efficient measures at no additional cost to customers.

The CWA was developed by the Parties Working Collaboratively (PWC) Weatherization Collaborative comprised of Arkansas IOUs and other stakeholders to provide a consistent and comprehensive

weatherization offering across the state of Arkansas. The former OG&E/AOG Weatherization Program designed and implemented by OG&E and AOG was the model for the rest of the state's IOUs CWA programs.

The IOUs are responsible for delivering the Program. Each IOU has a separate program budget and may use its own Building Performance Institute (BPI) or Residential Energy Services Network (RESNET) certified contractors or trained private contractors. Each IOU must follow the guidelines of the statewide approach when delivering weatherization services but is able to supplement the Program with complementary program elements such as additional measure offerings. While all IOUs are required to offer weatherization services under the CWA framework, each IOU offers its own iteration of the framework and may or may not deliver weatherization through a joint utility offering. OG&E's CWA is an example of a joint utility offering, where OG&E and Arkansas Oklahoma Gas (AOG) are the joint sponsors and share the costs of weatherizing participant homes.

The program targets energy-inefficient homes by requiring that participating residences must either be at least 10 years old or have a minimum energy usage cost per square foot of ten cents for electricity based on the customer's highest bill in the past 12 months.

The program is designed to facilitate the installation of a wide range of cost-effective weatherization measures that have been approved as "core measures" to be provided under the CWA framework, including:

- Ceiling Insulation;
- Air Infiltration;
- Duct Sealing;
- Advanced Power Strips;
- LEDs;
- Low-Flow Shower Heads; and
- Faucet Aerators.

Beginning in PY2020, the program included the Low-Income Weatherization (LI Wx) Pilot per requirements outlined in Act 1102. The LI Wx targets low income and elderly (age 65+) customers and is intended to provide enhanced health and safety improvements along with the energy efficiency improvements included under the CWA.

5.3 CWA Program Description

The Consistent Weatherization Approach (CWA) provides comprehensive in-home energy efficiency upgrades for single-family homes, duplexes, triplexes, and fourplexes. Buildings with five or more units are considered multifamily and are not included in CWA. The program is not income-based in Arkansas; services are available to both low-income and non-income-qualified customers.

CWA projects are delivered through a network of trade allies managed by the implementation contractor. These contractors implement a range of measures, including air sealing, duct sealing, insulation, and direct-install items, along with health and safety improvements such as smoke and carbon monoxide detectors. Health and safety measures do not generate energy savings but are included as part of the

service offering. For duct sealing and air sealing, minimum performance thresholds must be met before incentives are paid—25 percent reduction for duct leakage and 20 percent reduction for air infiltration.

The participation process begins when leads are received through multiple channels, including OG&E referrals, marketing campaigns, and community outreach. Trade allies also generate some leads, though staff noted these account for less than 10 percent of total participation. Once a lead is vetted for eligibility, projects are assigned to contractors based on capacity and geographic coverage. If a trade ally brings in a lead, they retain that project provided it meets program requirements.

After installation, contractors upload documentation into the program portal, including invoices, assessment reports, and pre- and post-installation photos for all measures. Photos must include rulers for insulation verification, and LED installations require pre- and post-installation images. The implementation contractor reviews this documentation for completeness and accuracy before processing incentives. A separate QA/QC team conducts field inspections for approximately 10 percent of completed homes, as specified in the program scope of work.

CWA operates in partnership with the local gas utility, AOG, for certain measures, with some incentives shared between the two utilities.

5.3.1 Marketing and Outreach

Interviewed staff described the marketing approach for the Consistent Weatherization Approach (CWA) as part of a broader, unified residential marketing strategy. Marketing activities for CWA are conducted alongside those for other residential offerings, including Residential Solutions and HVAC tune-ups. Staff explained that the same core marketing channels are used across programs, including email campaigns, postcards, paid search, Meta advertising, and billboards. Both OG&E and the implementer also support community outreach, such as participation in local events, back-to-school nights, and home and garden shows, which promote multiple residential programs simultaneously.

CWA uses the same customer acquisition channels as other programs, including OG&E-generated leads, implementer-generated leads, and community outreach. Staff also noted that OG&E recently introduced a Meta form enrollment option to reduce barriers to participation, and this approach is being used for weatherization as well as other residential offerings.

While the general marketing approach is shared, staff stated that the emphasis placed on specific programs shifts throughout the year depending on progress toward goals. Marketing for CWA may be increased or reduced relative to other programs based on current demand and performance. Program staff indicated that weatherization has experienced weaker lead generation than in prior years, and additional marketing tactics were introduced recently in response.

Trade allies generate a small share of leads through their interactions with customers, but contractors do not have formal marketing responsibilities for the program.

5.3.2 Program Contractors

The same contractors who participate in the Residential Solutions channel are currently used for the Consistent Weatherization Approach (CWA). Program staff described the weatherization contractor network as robust and noted that some additional trade allies have expressed interest in joining the

program in the next program year. Each contractor team must include at least one individual who holds a BPI Building Analyst Professional certification, which is required to perform work in the program. Certifications must be renewed every three years. CLEAResult offers optional BPI certification training as a fee-based service several times per year, and contractors may obtain certification through CLEAResult or any other qualified provider.

CLEAResult conducts annual kickoff meetings at the start of each program year, during which contractors receive refresher training and a review of program protocols, safety expectations, and BPI requirements.

5.4 Evaluation Approach

The sections below outline the evaluation approaches for the CWA Program.

5.4.1 Gross Impact Evaluation

5.3.1 Gross Impact Evaluation

The following sections outline the impact evaluation approach for each channel in CWA. For equipment and retrofits incentivized through the CWA, calculation methodologies were performed as described in the AR TRM v10.0. Section 3.1.1.2 identifies the sections in the AR TRM v10.0 that were used for verification of measure-level savings.

The gross impact evaluation effort included the following:

- **Desk Review of Residential Calculations:** For all channels, the Evaluator utilized AR TRM v10.0 in assessing ex-post savings from measures in CWA.
- **Data Tracking Review:** For all channels, project data from the third-party implementer was reviewed to ensure that tracking systems followed Protocol A, B1 and B2 of the AR TRM v10.0
- **Field Verification:** The Evaluator completed verification site visits for projects in PY2025.
 - **Weatherization component:** 27 total site visits.
 - **Low-Income Weatherization component:** 14 total site visits.

Additional details can be found in Appendix E Residential Site Visit Findings.

For additional details, see Section 3.1.1 Gross Impact.

5.4.2 Net Impact Evaluation

Section 3.1.2 Net Impact summarizes the net savings approach.

5.5 Evaluation Findings

5.5.1 Gross Impact Findings

After reviewing the tracking data and inputs for savings calculations, the Evaluator provided verified ex-post savings per AR TRM v10.0 Protocols. The savings from the measures below were verified, and matched, to the calculations provided by CLEAResult.

5.5.1.1 Weatherization (Wx)

The ex-post annual and lifetime energy saving impacts are summarized in Table 5-6 and Table 5-7.

TABLE 5-6 Wx ANNUAL SAVINGS SUMMARY

Measure	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)
Advanced Power Strip	24,211	23,874	98.6%	2.88	2.84	98.6%
Air Infiltration	681,946	729,692	107.0%	145.94	156.16	107.0%
Assessment	0	0	100.0%	0.00	0.00	100.0%
Ceiling Insulation	766,664	765,885	99.9%	233.08	235.65	101.1%
Duct Sealing	1,890,792	2,056,319	108.8%	474.46	491.30	103.5%
Faucet Aerator	4,054	4,182	103.2%	0.42	0.43	103.2%
Health & Safety	0	0	100.0%	0.00	0.00	100.0%
LED Lamp (Specialty)	7,413	7,488	101.0%	1.17	1.18	101.0%
LED Lamp (Standard)	34,945	35,694	102.1%	5.40	5.72	106.0%
Low-Flow Showerhead	8,475	8,592	101.4%	0.88	0.89	101.4%
Smart Thermostat	86,298	85,867	99.5%	0.00	0.00	100.0%
Wx Total	3,504,799	3,717,594	106.1%	864.23	894.18	103.5%
Sums may differ due to rounding.						

TABLE 5-7 Wx LIFETIME SAVINGS SUMMARY

Measure	Ex-Post Gross Energy Savings (kWh)	EUL	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Advanced Power Strip	23,874	10	238,737	229,188
Air Infiltration	729,692	20	14,593,849	14,010,095
Assessment	0	1	0	0
Ceiling Insulation	765,885	30	22,976,547	22,057,485
Duct Sealing	2,056,319	20	41,126,388	39,481,333
Faucet Aerator	4,182	10	41,821	40,148
Health & Safety	0	1	0	0
LED Lamp (Specialty)	7,488	13	93,604	89,860
LED Lamp (Standard)	35,694	13	446,177	428,330
Low-Flow Showerhead	8,592	10	85,921	82,484
Smart Thermostat	85,867	11	944,532	906,751
Wx Total	3,717,594	22	80,547,575	77,325,672
Sums may differ due to rounding.				

5.5.1.1.1 DISCUSSION OF REALIZATION RATES

Overall, there were very minor discrepancies in the ex-ante estimations and ex-post savings. Part of the reason for the slightly lower or higher realization rates were driven by the measure ISRs from the residential site visits completed in PY2025. Some of the measure ISRs were averaged with historical ISRs. See Section 3.1.1.7.2 for component-level ISRs.

5.5.1.2 Low-Income Weatherization (LI Wx)

The ex-post annual and lifetime energy saving impacts are summarized in Table 5-8 and Table 5-9.

TABLE 5-8 LI Wx ANNUAL SAVINGS SUMMARY

Measure	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)
Advanced Power Strip	22,446	20,290	90.4%	2.67	2.41	90.4%
Advanced Power Strip (Kit)	104,980	104,980	100.0%	14.76	11.92	80.7%
Air Infiltration	236,706	252,323	106.6%	64.33	68.62	106.7%
Assessment	0	0	100.0%	0.00	0.00	100.0%
Ceiling Insulation	436,615	435,860	99.8%	145.94	147.25	100.9%
Duct Sealing	674,108	794,021	117.8%	194.07	211.31	108.9%
Faucet Aerator	1,987	1,971	99.2%	0.21	0.21	99.2%
Health & Safety	0	0	100.0%	0.00	0.00	100.0%
LED Lamp (Kit) (Standard)	187,032	97,868	52.3%	6.53	15.91	243.8%
LED Lamp (Specialty)	4,300	4,339	100.9%	0.67	0.68	102.2%
LED Lamp (Standard)	26,241	26,854	102.3%	3.99	4.17	104.5%
Low-Flow Showerhead	3,971	3,673	92.5%	0.41	0.38	92.5%
Outlet Gasket (Kit)	32,440	32,440	100.0%	3.34	16.70	500.1%
Smart Thermostat	30,626	30,472	99.5%	0.00	0.00	100.0%
Weather Stripping (Kit)	17,061	17,061	100.0%	8.78	10.33	117.6%
LI Wx Total	1,778,513	1,822,155	102.5%	445.70	489.90	109.9%
Sums may differ due to rounding.						

TABLE 5-9 LI Wx LIFETIME SAVINGS SUMMARY

Measure	Ex-Post Gross Energy Savings (kWh)	EUL	Ex-Post Gross Lifetime Energy Savings (kWh)	Ex-Post Net Lifetime Energy Savings (kWh)
Advanced Power Strip	20,290	10	202,904	202,904
Advanced Power Strip (Kit)	104,980	10	1,049,799	1,049,799
Air Infiltration	252,323	20	5,046,454	5,046,454
Assessment	0	1	0	0
Ceiling Insulation	435,860	30	13,075,813	13,075,813
Duct Sealing	794,021	20	15,880,423	15,880,423
Faucet Aerator	1,971	10	19,712	19,712
Health & Safety	0	1	0	0
LED Lamp (Kit) (Standard)	97,868	13	1,223,350	1,223,350
LED Lamp (Specialty)	4,339	13	54,238	54,238
LED Lamp (Standard)	26,854	13	335,680	335,680
Low-Flow Showerhead	3,673	10	36,732	36,732
Outlet Gasket (Kit)	32,440	15	486,606	486,606
Smart Thermostat	30,472	11	335,197	335,197
Weather Stripping (Kit)	17,061	15	255,921	255,921
LI Wx Total	1,822,155	21	38,002,828	38,002,828
Sums may differ due to rounding.				

5.5.1.2.1 DISCUSSION OF REALIZATION RATES

Overall, there were very minor discrepancies in the ex-ante estimations and ex-post savings. Part of the reason for the slightly lower or higher realization rates were driven by the measure ISRs from the residential site visits completed in PY2025. Some of the measure ISRs were averaged with historical ISRs. See Section 3.1.1.7.2 for component-level ISRs.

5.5.2 Net Impact Findings

This section summarizes the results of the evaluation of net impacts.

Details on the methods and values used to estimate net savings are presented in Section 3.1.2.1.

PY2023 net savings results were applied to estimate net savings for the Wx channel, and the LI Wx channel was assigned a 100.0% NTG value.

5.5.2.1 Net Impacts by Channel

Table 5-10 and Table 5-11 summarize the net impacts by channel for CWA.

TABLE 5-10 GROSS EX-POST AND NET EX-POST KWH BY CHANNEL

Channel	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	Realization Rate (kWh)	NTG Ratio (kWh)	Ex-Post Net Energy Savings (kWh)
Weatherization	3,504,799	3,717,594	106.1%	96.0%	3,568,890
Low-Income Weatherization	1,778,513	1,822,155	102.5%	100.0%	1,822,155
CWA Total	5,283,312	5,539,748	104.9%	97.3%	5,391,044
Sums may differ due to rounding.					

TABLE 5-11 GROSS EX-POST AND NET EX-POST KW BY CHANNEL

Channel	Ex-Ante Gross Demand Reductions (kW)	Ex-Post Gross Demand Reductions (kW)	Realization Rate (kW)	NTG Ratio (kW)	Ex-Post Net Demand Reductions (kW)
Weatherization	864.23	894.18	103.5%	96.0%	858.42
Low-Income Weatherization	445.70	489.90	109.9%	100.0%	489.90
CWA Total	1,309.93	1,384.08	105.7%	97.3%	1,348.31
Sums may differ due to rounding.					

5.5.3 Non-Energy Benefits Findings

Protocol L of the AR TRM v10.0 states that EM&V of demand-side management (DSM) programs in Arkansas must account for non-energy benefits (NEBs) resulting from each program. Specifically, the categories of NEBs that are to be calculated for each DSM program are as follows:

- Benefits of electricity, natural gas, and liquid propane energy savings (i.e., other fuels);
- Benefits of public water and wastewater savings; and

- Benefits of avoided and deferred equipment replacement costs.

As discussed below, the NEBs applicable to the Consistent Weatherization Approach (CWA) Program are avoided replacement costs, natural gas (therms) savings, water savings, and propane savings. Section 3.1.3 discusses the methods used to calculate the NEBs.

Measures with zero entries are included to ensure consistency of table structure and to demonstrate that no measures or potential energy and non-energy impacts were omitted.

5.5.3.1 NEB Summary

The tables below summarize the Equipment Rebate Program NEBs.

TABLE 5-12 SUMMARY OF CWA PROGRAM EX-POST GROSS NEB BY CHANNEL AND MEASURE

Channel / Measure	Ex-Post Gross ARCs (\$)	Ex-Post Gross Natural Gas Savings (therms)	Ex-Post Gross Water Savings (gal)	Ex-Post Gross Propane Savings (gal)
Weatherization	\$4,087	114,332	130,257	0
Advanced Power Strip	\$0	0	0	0
Air Infiltration	\$0	32,668	0	0
Assessment	\$0	0	0	0
Ceiling Insulation	\$0	15,943	0	0
Duct Sealing	\$0	63,987	0	0
Faucet Aerator	\$0	0	45,308	0
Health & Safety	\$0	0	0	0
LED Lamp (Specialty)	\$722	-18	0	0
LED Lamp (Standard)	\$3,366	-138	0	0
Low-Flow Showerhead	\$0	0	84,950	0
Smart Thermostat	\$0	1,890	0	0
Low-Income Weatherization	\$12,001	54,553	66,974	0
Advanced Power Strip	\$0	0	0	0
Advanced Power Strip (Kit)	\$0	0	0	0
Air Infiltration	\$0	15,491	0	0
Assessment	\$0	0	0	0
Ceiling Insulation	\$0	8,183	0	0
Duct Sealing	\$0	28,490	0	0
Faucet Aerator	\$0	0	24,499	0
Health & Safety	\$0	0	0	0
LED Lamp (Kit) (Standard)	\$9,180	-636	0	0
LED Lamp (Specialty)	\$409	-19	0	0
LED Lamp (Standard)	\$2,411	-98	0	0
Low-Flow Showerhead	\$0	0	42,475	0
Outlet Gasket (Kit)	\$0	0	0	0
Smart Thermostat	\$0	3,143	0	0
Weather Stripping (Kit)	\$0	0	0	0
CWA Total	\$16,089	168,885	197,231	0
Sums may differ due to rounding.				

TABLE 5-13 SUMMARY OF CWA EX-POST NET NEB BY CHANNEL AND MEASURE

Channel / Measure	Ex-Post Net ARCs (\$)	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water Savings (gal)	Ex-Post Net Propane Savings (gal)
Weatherization	\$3,924	109,758	125,047	0
Advanced Power Strip	\$0	0	0	0
Air Infiltration	\$0	31,361	0	0
Assessment	\$0	0	0	0
Ceiling Insulation	\$0	15,305	0	0
Duct Sealing	\$0	61,428	0	0
Faucet Aerator	\$0	0	43,495	0
Health & Safety	\$0	0	0	0
LED Lamp (Specialty)	\$693	-17	0	0
LED Lamp (Standard)	\$3,231	-133	0	0
Low-Flow Showerhead	\$0	0	81,552	0
Smart Thermostat	\$0	1,815	0	0
Low-Income Weatherization	\$12,001	54,553	66,974	0
Advanced Power Strip	\$0	0	0	0
Advanced Power Strip (Kit)	\$0	0	0	0
Air Infiltration	\$0	15,491	0	0
Assessment	\$0	0	0	0
Ceiling Insulation	\$0	8,183	0	0
Duct Sealing	\$0	28,490	0	0
Faucet Aerator	\$0	0	24,499	0
Health & Safety	\$0	0	0	0
LED Lamp (Kit) (Standard)	\$9,180	-636	0	0
LED Lamp (Specialty)	\$409	-19	0	0
LED Lamp (Standard)	\$2,411	-98	0	0
Low-Flow Showerhead	\$0	0	42,475	0
Outlet Gasket (Kit)	\$0	0	0	0
Smart Thermostat	\$0	3,143	0	0
Weather Stripping (Kit)	\$0	0	0	0
CWA Total	\$15,925	164,311	192,021	0
Sums may differ due to rounding.				

TABLE 5-14 SUMMARY OF CWA NPV OF NEBS

Channel	NPV NGS (\$)	NPV LPGS (\$)	NPV Water (\$)	NPV ARC (\$)	NPV DRC (\$)
Weatherization	\$728,793	\$0	\$10,015	\$3,924	\$0
Low-Income Weatherization	\$359,356	\$0	\$5,364	\$12,001	\$0
CWA Total	\$1,088,150	\$0	\$15,378	\$15,925	\$0
Sums may differ due to rounding.					

5.5.4 Process Evaluation Findings

5.5.4.1 Required Participant Demographics and CWA Metrics

5.5.4.1.1 PARTICIPANT DEMOGRAPHICS

Table 5-15 summarizes the Act 1102 demographic metrics.

TABLE 5-15 SHARE OF HOUSEHOLDS 65+ AND LIHEAP ELIGIBLE METRICS

Channel	Age 65+	LIHEAP Eligible	Meet Both
CWA	0.00%	0.00%	0.0%
Low-Income CWA	65.6%	53.8%	19.4%

5.5.4.1.2 CONSISTENT WEATHERIZATION APPROACH REQUIRED METRICS

This section presents the required metrics for the CWA channels (CWA and IQ Wx).

Table 5-16 summarizes the CWA metrics for the core CWA program offering and Table 5-17 summarizes the alignment with CWA requirements. Table 5-19 and Table 5-20 provide the summaries for the low-income CWA program.

Table 5-16 CWA Required Process Evaluation Metrics - CWA

Metric	Value
Channel Name	Consistent Weatherization Approach Program
CWA Implementation	Yes
Total Audits Completed	843
Total Submitted Projects	886 in 923 homes
Conversion Rate	105%
Measures installed per-project	3.83
Cost per participant	No customer co-pay. OG&E paid \$1,570/home
Percent of contractors promoting program	100%

TABLE 5-17 CWA ALIGNMENT WITH CWA REQUIREMENTS - CWA

Requirement	Alignment with Requirement	Percent of Participants Receiving
Includes Applicable DI Measures	Yes	33.0%
Aerators	Yes	6.6%
Showerheads	Yes	2.4%
Efficient lighting	Yes	25.1%
Advanced power strips	Yes	8.5%
Prequalifies homes based on year of construction or energy costs	Yes, the customer must have had a bill in the last twelve months that exceeded ten cents per square foot, or the home's age is 10 years or greater.	100.0%
TRC is used to assess program cost-effectiveness	Yes	N/A

Requirement	Alignment with Requirement	Percent of Participants Receiving
Measures screened using SIR or comparable metric	Yes	N/A
Includes Core No Cost Measures	Yes	91.5%
Audit	Yes	91.3%
Ceiling insulation	Yes	53.5%
Duct sealing	Yes	61.0%
Air infiltration reduction	Yes	59.9%
Safety testing and/or measures	Yes	44.9%
Offers other utility measures	Yes	3.3%
Contractors are certified BPI Building Analyst or RESNET HERS Rater	Yes, for duct sealing, air infiltration, and assessments. Insulation requires Arkansas Home Improvement Specialty License.	N/A

Table 5-18 Summary of Home Participation - CWA

Average Ex-Ante kWh Savings	Average Incentive Amount	Total Number of Measures Installed	Average Number of Measure Types Implemented ¹	Adjusted Average Number of Measure Types Implemented ²
3,956	\$1,040.84	6,559	2.35	2.27
1. Based on counts of unique measure types: Ceiling Insulation, Air Infiltration, Duct Sealing, ENERGY STAR Omni-Directional LED's, Advanced Power Strips, Low-flow Showerheads, Faucet Aerators, and Wall Insulation.				
2. The Adjusted Average Number of Measure Types is limited to participants that received an audit before October 1st of the program year.				

Table 5-19 CWA Required Process Evaluation Metrics – LI Wx

Metric	Value
Channel Name	Low Income Consistent Weatherization Approach Program
CWA Implementation	Yes
Total Audits Completed	457
Total Submitted Projects	483 in 515 homes
Conversion Rate	106%
Measures installed per-project	2.35
Cost per participant	No customer co-pay. OG&E paid \$1,564/home
Percent of contractors promoting program	100%

TABLE 5-20 CWA ALIGNMENT WITH CWA REQUIREMENTS – LI Wx

Requirement	Alignment with Requirement	Percent of Participants Receiving
Includes Applicable DI Measures	Yes	40.2%
Aerators	Yes	6.0%
Showerheads	Yes	2.3%
Efficient lighting	Yes	31.3%
Advanced power strips	Yes	11.5%
Prequalifies homes based on year of construction or energy costs	Yes, the customer must have had a bill in the last twelve months that exceeded ten cents per square foot, or the home's age is 10 years or greater.	100.0%
TRC is used to assess program cost-effectiveness	Yes	N/A
Measures screened using SIR or comparable metric	Yes	N/A
Includes Core No Cost Measures	Yes	89.9%
Audit	Yes	88.7%
Ceiling insulation	Yes	61.9%
Duct sealing	Yes	52.6%
Air infiltration reduction	Yes	50.3%
Safety testing and/or measures	Yes	57.7%
Offers other utility measures	Yes	3.1%
Contractors are certified BPI Building Analyst or RESNET HERS Rater	Yes	N/A

The table below summarizes the health and safety incentive spend and any claimed savings for LI Wx.

TABLE 5-21 LI Wx HEALTH AND SAFETY SPEND

LI Wx H&S Measures	Count of Participants	Count of Participants Receiving	Total Quantity	Energy Savings (kWh)	Incentive
H&S Total	515	297	846	0	\$87,797

5.5.5 Protocol A Database Review

The tracking system in the database conforms reasonably well to the tracking system protocol developed for use in Arkansas. Table 5-22 shows a summary of how well the program tracking systems meets the components of the protocol.

TABLE 5-22 CWA PROTOCOL A SUMMARY

Category	Field	Status	Description of Issue(s)
Participating Customer Information	Unique customer identifier, such as account number	✓	
	Customer contact information – name, mailing address, telephone number	✓	
	Date/s of major customer milestones such as rebate application date, approval date, rebate processing date, etc.	✓	
Measure-Specific Information	Measure Group (Equipment Type)	✓	
	Equipment Fuel/Energy Source	✗	The fields are present, but heating system type included entry errors.
	Equipment Quantity	✓	
	Efficiency Level	✓	
	Estimated Savings	✓	
	Estimated incremental measure cost	✗	There is no designated column in tracking data for IMC.
	Equipment Useful Life	✓	
	Measure Name – Text Description	✓	
	Measure Name – Numerical Code	N/A	
	Serial Number	N/A	
	Reported age of equipment replaced	N/A	
	Reported measure type of equipment replaced	✓	
	Other inputs necessary for the use and compliance with the TRM	✓	
Vendor-Specific Information	Name and Contact Information for Contractor	✓	
	Contractor Type	✓	
	Date of Installation	✓	
	Cost of the installed equipment	✓	
	Efficiency level of the installed equipment	✓	
Program Tracking Information	Date of the initial program contact/rebate information	✓	
	Date of rebate/incentive paid	✓	
	Incentive amount paid to-date	✓	
	Incentive amounts remaining	✓	
	Application Status (i.e., number of applications approved, pending, or denied)	✓	
	Reason and reason code for application denial	✓	
Program Costs	Overall program budgets	✓	
	Program expenditures to-date	✓	
	Incentive Costs	✓	
	Administrative Costs	✓	
	Marketing/Outreach Costs	✓	
	Evaluation Costs	✓	
Marketing and Outreach Activities	Advertising and marketing spending levels	-	Not itemized from total marketing costs.
	Media schedules	N/A	
	Summary of number of community events/outreach activities	✓	
	Other media activities – estimated impressions via mailings, television/radio; print ads.	✓	

5.6 Key Findings and Recommendations

The Weatherization and Low-Income Weatherization components achieved a combined 104.9% of expected kWh savings and 105.7% of expected kW reductions. The Evaluator did not find discrepancies in ex-ante estimations. The slightly higher realization rates are attributed to the ISRs that have been applied to each of the respective measures.

Arkansas uses a statewide approach to residential weatherization, and the Consistent Weatherization Approach (CWA) reflects OG&E's implementation of that framework. The program is delivered through certified contractors and includes a defined package of weatherization and health and safety measures, with incentive payments tied to verified duct sealing and air sealing performance thresholds.

Program oversight relies on documented project review and a combination of desk-based verification and field inspections for a sample of completed homes. Contractors are required to meet BPI certification requirements, and project documentation is reviewed prior to incentive payment. Marketing and customer acquisition for CWA are integrated with other OG&E residential offerings and adjusted over time based on program activity and demand. Staff described the contractor network as stable, with interest from additional contractors anticipated in future program years.

6 Commercial Energy Efficiency Program

6.1 Summary

The verified ex-post gross energy savings (kWh) and demand reductions (kW) for the Commercial Energy Efficiency Program are summarized in the table below.

TABLE 6-1 EX-ANTE AND EX-POST SAVINGS BY STRATUM FOR CEEP

Stratum Name	Ex-Ante Gross Energy (kWh)	Ex-Post Gross Energy (kWh)	Realization Rate	Ex-Ante Gross Demand (kW)	Ex-Post Gross Demand (kW)	Realization Rate
Large C&I (Certainty)	5,029,266	5,464,216	109.0%	598.60	644.00	108.0%
Large C&I 2	2,467,126	2,467,127	100.0%	316.73	309.87	98.0%
Large C&I 3	1,193,107	1,246,378	104.0%	102.55	107.00	104.0%
Large C&I 4	1,165,719	1,121,384	96.0%	269.80	260.62	97.0%
SAGE	1,413,483	1,451,455	103.0%	217.25	221.22	102.0%
SBS	1,673,741	1,680,382	100.0%	280.20	285.49	102.0%
CEI	3,775,846	3,967,443	105.0%	855.57	919.00	107.0%
HVAC	140,637	103,847	74.0%	71.49	55.00	77.0%
Midstream	4,970,591	5,715,989	115.0%	999.99	1,084.66	108.0%
Total	21,829,515	23,218,222	106.4%	3,712.19	3,887.12	104.7%
Sums may differ due to rounding.						

Table 6-2, Table 6-3, and Table 6-4 present the energy savings (kWh) and demand reductions (kW), by program channel.

TABLE 6-2 CEEP kWh SAVINGS BY CHANNEL

Channel	Ex-Ante Gross Energy Savings (kWh)	Ex-Post Gross Energy Savings (kWh)	NTG	Ex-Post Net Energy Savings (kWh)
C&I Solutions	9,855,218	10,299,105	92.0%	9,475,177
SAGE	1,413,483	1,451,455	92.0%	1,335,339
SBS	1,673,741	1,680,382	100.0%	1,680,382
CEI	3,775,846	3,967,443	100.0%	3,967,443
HVAC	140,637	103,847	100.0%	103,847
Midstream	4,970,591	5,715,989	100.0%	5,715,989
Total	21,829,515	23,218,222	96.0%	22,278,177
Sums may differ due to rounding.				

TABLE 6-3 CEEP kW SAVINGS BY CHANNEL

Channel	Ex-Ante Gross Demand (kW)	Ex-Post Gross Demand (kW)	NTG	Ex-Post Net Gross Demand (kW)
C&I Solutions	1,287.69	1,321.49	92.0%	1,215.77
SAGE	217.25	221.22	92.0%	203.52
SBS	280.20	285.49	100.0%	285.49
CEI	855.57	919.00	100.0%	919.00
HVAC	71.49	55.26	100.0%	55.26
Midstream	999.99	1,084.66	100.0%	1,084.66
Total	3,712.19	3,887.12	96.0%	3,763.70
Sums may differ due to rounding.				

TABLE 6-4 CEEP LIFETIME SAVINGS BY CHANNEL

Channel	Ex-Post Gross Savings (kWh)	Ex-Post Gross Lifetime Energy Savings (kWh)	NTG	Ex-Post Net Lifetime Savings (kWh)
C&I Solutions	10,299,105	154,651,785	92.0%	142,279,642
SAGE	1,451,455	21,162,381	92.0%	19,469,390
SBS	1,680,382	24,870,275	100.0%	24,870,275
CEI	3,967,443	3,967,443	100.0%	3,967,443
HVAC	103,847	442,915	100.0%	442,915
Midstream	5,715,989	78,600,544	100.0%	78,600,544
Totals	23,218,222	283,695,342	96.0%	269,630,209
Sums may differ due to rounding.				

6.2 Commercial Energy Efficiency Program Description

CEEP provides financial incentives to commercial and industrial (C&I) customers and includes five channels of participation designed to maximize participation opportunities among the C&I customer base.

- Large C&I
- Schools and Government (SAGE)
- Small Business Solutions
- Midstream
- Continuous Energy Improvement (CEI)

The program seeks to combine financial incentives with access to technical expertise to maximize program penetration across the range of potential C&I customers. The primary goal of the program is to generate energy and demand savings for large and small commercial and industrial customers through the promotion of high efficiency electric end-use products including (but not limited to): lighting, retrofit of existing equipment, and HVAC replacement. The program provides OG&E's C&I customers with flexibility in choosing how to participate, either by self-sponsoring or by working through a third-party service provider to leverage technical expertise. The program has the following additional goals:

- Increase customer awareness of applicable energy saving measures;
- Achieve customer cost savings;

- Increase the market share of commercial grade high efficiency technologies sold through market channels;
- Increase the installation rate of high efficiency technologies in C&I facilities by businesses that would not have done so absent the program.

The program offers prescriptive incentives for electric energy efficiency equipment upgrades and improvements. Incentives are provided for qualified equipment installed as a retrofit or equipment replacement, and as new construction or major refurbishment. The program also offers incentives for custom measures that are not included in the program as prescriptive measures.

6.2.1 Marketing and Outreach

Marketing and outreach for OG&E's commercial programs are primarily managed by the implementation contractor, with oversight and approval from OG&E. CLEAResult develops marketing materials such as flyers, point-of-purchase signage, and promotional collateral, which are reviewed and approved by OG&E's marketing team before use. OG&E owns and maintains the content on its website, occasionally seeking input from the implementer.

For most program channels, outreach is conducted through direct engagement rather than broad media campaigns. Staff reported that there are no paid media campaigns or large-scale advertising efforts for these programs. Instead, outreach relies on targeted strategies:

- **C&I Solutions and SAGE (Schools and Government)** : Outreach is primarily through OG&E account executives, community affairs managers, and CLEAResult's local outreach team. These staff leverage existing relationships and community networks to identify and engage eligible customers. For schools and nonprofits, outreach sometimes includes participation in local events, such as school kickoff sessions, and collaboration with chambers of commerce and nonprofit associations.
- **Small Business Solutions:** Marketing is largely driven by trade allies, who receive program materials and annual training from CLEAResult. Trade allies use these resources to promote the program to customers and guide them through participation. CLEAResult conducts annual kickoff meetings and refresher trainings for trade allies, as well as onboarding sessions for new participants. Training covers program processes, use of the field tool and online portal, and any updates to program requirements.
- **Midstream:** Outreach focuses on in-store engagement and distributor training. CLEAResult provides distributors with point-of-sale materials such as counter mats, window clings, and floor stands, and conducts annual onboarding and refresher trainings for distributor staff. These trainings emphasize program requirements and sales techniques to ensure incentives are applied correctly at the point of sale. Distributors primarily rely on in-store signage and word-of-mouth marketing to promote the program.
- **CEI:** Recruitment for this channel is handled through OG&E account executives and targeted outreach to large customers

Staff noted that while direct outreach and relationship-based engagement are the primary strategies, occasional participation in trade shows and community events occur in partnership with OG&E.

6.2.1.1 Marketing Content

The Evaluator reviewed the program website, social media posts, and flyers available from the program website. The table below summarizes the themes.

TABLE 6-5 SUMMARY OF COMMERCIAL MARKETING THEMES

Theme	Summary	Example Phrases from Materials
Reduce Operating Costs & Energy Use	Help businesses lower energy usage and reduce ongoing operating expenses through efficiency.	"Reduce energy costs, improve efficiency for your nonprofit" / "Lower monthly energy bills"
Tailored Assessments & Expert Guidance	Offers consultations and energy assessments to identify opportunities specific to each business.	"Energy assessments" / "No-cost walkthrough of your facilities"
Financial Incentives to Offset Costs	Provides incentives covering a large portion of upgrade costs; up to 90% for small businesses.	"Get incentives for your nonprofit's efficiency" / "We'll help you secure the largest incentives"
Practical Efficiency Upgrades	Promote solutions like LED lighting, A/C tune-ups, efficient refrigeration, and building controls.	"A/C tune-ups" / "Lighting upgrades" / "Advanced A/C Tune-Up can improve efficiency by up to 30%"
Midstream Support & Point-of-Sale Incentives	Instant discounts on energy-efficient products at purchase to reduce upfront costs.	"Instant rebates for small business" / "Save up to \$100 on LED fixtures"
Benchmarking & Tracking Improvements	Includes tools for benchmarking and tracking energy performance over time.	"Compare facilities in a benchmark study"
Highlighting Case Examples & Partners	Uses real-world examples (schools, nonprofits, businesses) to show program success.	"OG&E works with nonprofits to reduce monthly energy costs"

6.2.2 Program Contractors

Trade allies play a central role in the delivery of OG&E's commercial programs, particularly in the Small Business Solutions channel and, to a lesser extent, in supporting projects under C&I Solutions and SAGE. The implementation contractor manages trade ally engagement, including recruitment, onboarding, training, and ongoing support, with oversight from OG&E.

6.2.2.1 Management and Recruitment

Trade allies are recruited and maintained by the implementation contractor. Recruitment focuses on contractors capable of delivering lighting retrofits and other eligible measures for small business customers. For C&I and SAGE programs, trade allies may be engaged when customers require installation support for capital projects. The implementer provides customers with a list of approved trade allies to facilitate project completion. While the program traditionally relies on trade allies for small business projects, staff noted that direct outreach models are being explored for future implementation.

6.2.2.2 Training and Quality Assurance

Training for trade allies includes annual kickoff sessions that provide updates on program processes and requirements. These sessions may involve contractors, distributors, and other partners supporting the commercial portfolio. In addition to these annual refreshers, onboarding training is provided for new trade allies and covers use of CLEAResult's field tool and online portal for project submission, relevant program procedures, and requirements related to qualified products and documentation. Staff reported that additional training is provided when program changes occur or when updates are made to program tools or technologies.

Quality assurance processes are closely integrated with trade ally oversight. Staff described a structured QA/QC approach in which new trade allies, or those placed on probation, receive 100% inspection coverage for their initial set of projects before transitioning to standard sampling. For ongoing participation, the program applies randomized QA/QC sampling. Within the Small Business Solutions channel, staff noted that QA/QC activity typically exceeds the minimum requirement of 20%, with actual inspection levels closer to 50% in recent years.

6.2.2.3 Marketing Support

Trade allies are responsible for most customer-facing marketing for the Small Business Solutions channel. The implementation contractor provides marketing materials such as flyers and program guides to support these efforts. Trade allies also receive sales training during annual kickoff sessions and as needed throughout the year. While trade allies are the primary marketing channel for small business customers, staff noted that they occasionally participate in regional events and trade shows in partnership with OG&E and Clear Result. There are no large-scale paid media campaigns or email marketing efforts associated with trade ally outreach.

6.2.3 Quality Control and Verification

Quality control and verification processes are primarily managed by the implementation contractor, with oversight from OG&E. These processes include both desk reviews and on-site inspections, with requirements varying by program channel and project type.

The implementation contractor has established a dedicated QA/QC team separate from program delivery staff to maintain independence and consistency in verification processes. This team is responsible for approving all QA/QC activities, including site inspections and desk reviews, and provides an additional layer of oversight beyond the program team. OG&E staff also review monthly data submissions and reconcile incentive payments against reported project activity twice per year to ensure financial accuracy.

Channel specific approaches are discussed below.

6.2.4 C&I Solutions and SAGE

The C&I Solutions channel serves large commercial and industrial customers, generally those with peak demand above 250 kW. Customers typically enter the program through multiple pathways, including referrals from OG&E account executives, community affairs managers, the call center, or trade allies. Leads may also originate from CLEAResult's outreach team. Once a lead is identified, the implementer conducts a pre-inspection and a comprehensive facility audit to identify energy efficiency opportunities. Customers receive an opportunity review outlining potential projects, and they decide which measures to

pursue. The program offers both prescriptive and custom incentives, with most savings coming from custom projects implemented by large industrial customers. Lighting and HVAC measures are common prescriptive offerings, while custom projects often involve multi-year planning and, in some cases, staggered incentive payments due to annual budget limits. Engineering support is provided for savings calculations and measurement and verification (M&V). OG&E staff maintain oversight and coordination, while CLEAResult manages customer engagement, technical assistance, and incentive processing.

The SAGE channel serves schools, municipalities, and nonprofit organizations with 501(c)(3) status. Staff described common project types in this channel as including lighting retrofits, A/C tune-ups, and custom opportunities such as retro-commissioning. Participation is often facilitated through direct outreach by CLEAResult's local team, in coordination with OG&E community affairs managers and account executives. Staff reported that schools represent a significant share of participation, though nonprofits and municipal entities are also targeted. Incentive levels for this channel are higher than other programs to address financial barriers faced by these organizations. Challenges include limited capital budgets, lengthy approval processes, and competing priorities within public institutions. Outreach efforts sometimes involve partnerships with chambers of commerce and nonprofit associations. Seasonal opportunities, such as performing A/C tune-ups during school breaks, are leveraged to minimize disruption. Smart thermostats are being piloted as an additional offering for schools and small businesses.

For large commercial and industrial projects and schools/government projects, QA/QC requirements are more stringent. These channels require 100% pre- and post-installation inspections for all projects, regardless of size or measure type. In addition to site visits, every project receives a desk review to verify savings calculations, equipment specifications, and incentive eligibility. Custom projects involve additional engineering review and, in some cases, coordination with the Evaluator to confirm methodologies and savings estimates before incentive payments are processed.

6.2.5 Small Business Solutions

Small Business Solutions targets customers below the 250 kW peak demand threshold. The program primarily focuses on lighting retrofits, though some additional measures such as refrigeration gaskets and door stripping are available. Projects are generally initiated through trade allies, who play a central role in customer engagement and project delivery. Trade allies use CLEAResult's field tool and online portal to submit project details, including scope of work and equipment specifications. This tool is also used to complete the assessments and to collect site data. Incentives are applied as discounts at the point of invoicing, reducing upfront costs for customers. While the program is traditionally trade ally-driven, staff indicated that direct outreach models are being explored for future implementation.

The program applies a structured QA/QC protocol for trade ally projects. New trade allies or those placed on probation undergo 100% inspection of their first five projects or until probation is lifted. After this initial phase, the standard requirement is randomized inspections of 20% of projects, both pre- and post-installation. However, staff reported that actual inspection rates often exceed this minimum, with approximately 50% of projects receiving on-site verification. All projects also undergo desk reviews to confirm documentation accuracy and compliance with program requirements.

6.2.6 HVAC Tune Ups

HVAC tune-ups are offered within the SAGE (schools, government, and nonprofit) program and have also been described by staff as a measure deployed or explored within the Small Business Solutions program, depending on customer suitability and implementation considerations. Program staff described HVAC tune-ups as being delivered through direct engagement with customers, typically facilitated by the implementation team or participating trade allies. Customers are identified through program outreach or channel-specific intake processes, and HVAC tune-ups are incorporated alongside other eligible measures, such as lighting retrofits.

In the Small Business Solutions program, HVAC tune-ups were described as an emerging or selectively deployed measure, with implementation dependent on staffing availability, cost-effectiveness considerations, and customer suitability. In the SAGE program, HVAC tune-ups were described as a common offering for schools and other public or nonprofit facilities, where implementation can be scheduled during periods of low building occupancy. In both channels, incentives are applied through the standard program workflow.

Verification and quality control for HVAC tune-up activities follow the same procedures used for other measures within the respective channels. These procedures include documentation review, data checks, and, where applicable, pre- and post-installation inspections conducted by the implementation team. Program staff also described cross-channel data checks as part of broader quality assurance practices to ensure compliance with program rules and to prevent double counting of measures across channels; however, these checks are conducted within the context of overall program oversight rather than through a midstream sales data process.

6.2.7 Midstream

The Midstream channel provides point-of-sale discounts on qualified lighting products through participating distributors. Customers present their OG&E account number or business address at the time of purchase, and distributors verify eligibility through CLEAResult's Energy Orbit portal. Incentives are applied immediately at the counter. Staff noted that this design reduces administrative requirements for customers and is viewed as a primary benefit of the midstream approach. Participating distributors receive marketing and point-of-purchase materials supplied by OG&E and CLEAResult, along with onboarding and in-store training for sales staff and additional training when program changes occur. While lighting products represent the primary focus of the channel, staff reported that commercial kitchen equipment is also eligible, although participation has been limited. Expansion to HVAC measures has been considered but faces cost-effectiveness challenges due to high baseline efficiencies.

Verification for the midstream channel focuses on data integrity and compliance with program rules. Distributors submit monthly sales data, which is reviewed for accuracy and completeness. The implementation team conducts quality checks to ensure that incentives are applied correctly and that customers meet eligibility requirements. These checks include cross-referencing sales data against other program channels to prevent double counting of measures. Staff also indicated that customer contact information is verified during evaluation periods to support survey outreach.

6.2.8 CEI

The CEI program targets very large customers, typically those with annual usage exceeding 15 million kWh. Participants commit to a multi-year engagement focused on behavioral and operational improvements to reduce energy consumption. The program includes five workshops per year, where participants receive training and share best practices. Customers form internal energy teams to implement changes, such as adjusting equipment schedules and engaging staff in energy-saving behaviors. Engineering support is provided for initial walkthroughs, opportunity assessments, and ongoing guidance. Savings are tracked against a customer baseline, and incentives are tied to calculated reductions. Some participants also pursue capital projects through other OG&E programs, such as C&I Solutions, for which savings are recorded separately. Recruitment is primarily through OG&E account executives, with emphasis on customers that can adjust operational practices. Staff noted that the program recently shifted its measurement period to align with program years (October–September). This change was intended to support consistent modeling and reduce reliance on forecasted savings at the end of the year.

QA/QC for CEI is primarily tied to savings verification rather than installation inspections. The program uses modeled baselines and tracks performance over time, with adjustments made based on verified operational changes.

6.3 Evaluation Approach

This section provides a brief overview of the data collection activities, gross and net impact calculation methodologies, and process evaluation activities that the Evaluator employed in the evaluation of the C&I Solutions Program. The evaluation activities conducted are summarized in Table 6-6.

TABLE 6-6 CEEP EVALUATION ACTIVITIES

Impact Evaluation	NTG	Process Evaluation
Database and document review, TRM deemed savings calculation review, desk reviews of project documentation, and custom EM&V savings verification.	Participant self-report survey for prescriptive and direct install projects.	Utility Staff interview Surveys of program participants

6.3.1 Data Collection

Data for the evaluations were collected through review of program materials, end-use metering, and interviews with participating customers and service providers. Based on program tracking data provided by CLEAResult, sample design was developed for M&V data collection. The central program database, where program activities are tracked, and project documentation is stored, was developed, and managed by CLEAResult. The verification and data collection samples were drawn to provide gross impact estimates with $\pm 10\%$ precision or better at the 90% confidence level for the overall program.

Desk reviews of project documentation and site visits were used to collect data for gross impact calculations, to verify measure installation, and to determine measure operating parameters. Projects were selected for on-site inspections at random, except for those with a higher level of uncertainty (custom sites, etc.). Deemed values were used to determine ex-post energy savings, including equivalent full load hours for heating and cooling projects, or annual operating hours for lighting projects, the Evaluator referred to the AR TRM v10.0.

Table 6-7 presents the sample design. The projects that were sampled for measurement and verification come from all various channels in the program. The larger C&I channels have multiple strata, while all the rest of the channels have one.

TABLE 6-7 CEEP SAMPLE DESIGN

Stratum Name	Ex-Ante Gross kWh Savings	Strata Minimum (kWh)	Strata Maximum (kWh)	Population of Projects	Design Sample Size
Large C&I (Certainty)	5,029,266	1,000,000	NA	2	2
Large C&I 2	2,467,126	450,000	1,000,000	3	2
Large C&I 3	1,193,107	175,000	450,000	4	3
Large C&I 4	1,165,719	0	175,000	27	6
SAGE	1,413,483	NA	NA	17	5
SBS	1,673,741	NA	NA	59	10
CEI	3,775,846	NA	NA	6	6
HVAC	140,637	NA	NA	10	10
Midstream	4,970,591	NA	NA	17	17
Total	21,829,515	-	-	145	61

Sums may differ due to rounding.

6.3.2 Gross Impact Estimation

The evaluation of gross energy savings (kWh) and demand reductions (kW) from projects incentivized through CEEP can be broken down into the following steps:

- First, CLEAResult's tracking database was reviewed to determine the scope of the program and to ensure there were no duplicate entries. The tracking database was used to define a discrete set of rebated projects that made up the PY2025 program population. A random sample of projects was then drawn from the population established in the tracking system review. Individual projects from the Large C&I, SBS, and SAGE program channels were selected for the M&V sample. For the Midstream, Continuous Energy Improvement, and HVAC Tune-up channels, a database review resulted in a census of projects being reviewed.
- Next, a detailed desk review was conducted for each project sampled for measurement and verification. The desk review process includes a thorough examination of all project materials including invoices, equipment cut sheets, pre- and post-inspection reports, and estimated savings calculators. Additionally, the review process involved assessing the reasonableness of deemed savings values given in the AR TRM v10.0 and calculation input assumptions.
- For the Midstream channel, no on-site inspections were conducted. Instead, the Evaluator reviewed the implementation contractor's database to determine methodologies and assumptions used to determine ex-ante savings. For this channel, ex-post savings are determined through the database review process. A more detailed description of the methodology used to determine ex-post savings for the Midstream channel is included in the following sections.
- For the CEI channel, no on-site inspections were conducted. The Evaluator conducted whole facility analysis using utility billing regression.
- For the HVAC Tune-up channel, no on-site inspections were conducted. The Evaluator conducted whole facility analysis using utility billing regression.

- Finally, after determining the ex-post savings impacts for each sampled project, results were extrapolated to the program population using project specific sampling weights. This allows for the estimation of program level gross ex-post energy (kWh) savings with a given amount of sampling precision and confidence. For the CEEP, the sample was designed to ensure $\pm 10\%$ or better relative precision at the 90% confidence level for kWh savings.

6.3.3 Net Impact Evaluation

For additional details, see Section 3.1.2 Net Impact.

6.4 Evaluation Findings

The reported ex-ante savings for CEEP were 21,829,515 kWh. The Evaluator found ex-post gross savings of 23,218,222 kWh (106% gross realization). The ex-post net savings were 22,278,177 kWh which was 117% of the program's net savings goal.

The PY2025 sample resulted in ex-post gross kWh estimates with less than $\pm 10\%$ relative precision at the 90% confidence interval. Ex-post gross energy savings were relatively close to the original reported values at the program level (106% gross realization rate).

6.4.1 Large C&I

The Large C&I channel of CEEP offers incentives to customers with a peak demand of greater than 150 kW at a single site. Incentives are paid directly to customers who install energy efficient equipment. This channel focuses on five key areas; lighting, retrofit of existing equipment, new constructions built above minimum building code, high efficiency industrial equipment, and HVAC replacement. The Large C&I channel is the largest of the six channels offered through CEEP. There was one custom project in the Large C&I channel in PY2025 that contributed significant amount of savings, see the Large C&I (Certainty) strata.

TABLE 6-8 LARGE C&I ACHIEVEMENTS

Channels	Percentage of PY2025 Target Achieved
Ex-Post Net Energy Savings (kWh)	113%
Ex-Post Net Demand Reduction (kW)	100%
Participation (projects)	72%
Budget vs Spend	89%

TABLE 6-9 LARGE C&I PERFORMANCE METRICS

Metric	PY2025
Number of Projects	22
Incentive Spend (\$)	\$1,146,777.39
Net Target Energy Savings	8,416,704
Ex-Ante Gross Energy Savings	9,855,218
Ex-Post Gross Energy Savings	10,299,105
Ex-Post Net Energy Savings	9,475,177
Net Target Demand Savings	1,323.24
Ex-Ante Demand Savings	1,287.69
Ex-Post Gross Demand Savings	1,321.49
Net Ex-Post Demand Savings	1,215.77

6.4.2 SAGE

The SAGE channel of CEEP is marketed towards public school districts, private schools, universities and colleges, and all government agencies. This channel includes financial incentives for both lighting and non-lighting measures and both prescriptive and custom projects. In PY2025 this channel accounted for 6% of ex-ante savings.

TABLE 6-10 SAGE ACHIEVEMENTS

Channel	Percentage of PY2025 Target Achieved
Ex-Post Net Energy Savings (kWh)	111%
Ex-Post Net Demand Reduction (kW)	117%
Participation (projects)	72%
Budget vs Spend	89%

TABLE 6-11 SAGE PERFORMANCE METRICS

Metric	PY2025
Number of Projects	14
Incentive Spend (\$)	\$ 294,970.33
Net Target Energy Savings	1,207,164
Ex-Ante Gross Energy Savings	1,413,483
Ex-Post Gross Energy Savings	1,451,455
Ex-Post Net Energy Savings	1,335,339
Net Target Demand Savings	189.79
Ex-Ante Demand Savings	217.25
Ex-Post Gross Demand Savings	221.22
Net Ex-Post Demand Savings	203.52

6.4.3 Small Business Solutions

This channel offers incentives to customers with a peak demand of less than 150 kW at a single site, for lighting audits and equipment installation through approved Trade Allies. During PY2025 this channel accounted for 8% of program ex-ante savings.

TABLE 6-12 SMALL BUSINESS SOLUTIONS ACHIEVEMENTS

Channel	Percentage of PY2025 Target Achieved
Ex-Post Net Energy Savings (kWh)	118%
Ex-Post Net Demand Reduction (kW)	127%
Participation (projects)	72%
Budget vs Spend	89%

TABLE 6-13 SMALL BUSINESS SOLUTIONS PERFORMANCE METRICS

Metric	PY2025
Number of Projects	54
Incentive Spend (\$)	\$333,366.19
Net Target Energy Savings	1,429,433
Ex-Ante Gross Energy Savings	1,673,741
Ex-Post Gross Energy Savings	1,680,382
Ex-Post Net Energy Savings	1,680,382
Net Target Demand Savings	224.73
Ex-Ante Demand Savings	280.20
Ex-Post Gross Demand Savings	285.49
Net Ex-Post Demand Savings	285.49

6.4.4 CEI

Continuous Energy Improvement is a behavioral channel of CEEP that aims to engage larger customers whose goals include cost savings from low-cost to no-cost measures. The Continuous Energy Improvement Channel was the third largest channel offered through CEEP in PY2025. Five customers participated in the CEI program. The CEI channel is a 36-month behavioral program that provides energy conservation training to all levels of employees within a customer's organization with a focus on low/no cost savings opportunities. The program also offers a facility wide assessment of energy usage and provides customers with continuous energy usage monitoring.

TABLE 6-14 CEI ACHIEVEMENTS

Channel	Percentage of PY2025 Target Achieved
Ex-Post Net Energy Savings (kWh)	123.03%
Ex-Post Net Demand Reduction (kW)	181.27%
Participation (projects)	72%
Budget vs Spend	89%

TABLE 6-15 CEI PERFORMANCE METRICS

Metric	PY2025
Number of Projects	5
Incentive Spend (\$)	\$76,016.92
Net Target Energy Savings	3,224,706
Ex-Ante Gross Energy Savings	3,775,846
Ex-Post Gross Energy Savings	3,967,443
Ex-Post Net Energy Savings	3,967,443
Net Target Demand Savings	506.97
Ex-Ante Demand Savings	855.57
Ex-Post Gross Demand Savings	919.00
Net Ex-Post Demand Savings	919.00

6.4.5 HVAC

The HVAC channel is a channel of CEEP that aims to improve the efficiency of existing HVAC units. The HVAC Channel was the smallest channel offered through CEEP in PY2025. Five customers participated in the CEI program.

TABLE 6-16 HVAC ACHIEVEMENTS

Channel	Percentage of PY2025 Target Achieved
Ex-Post Net Energy Savings (kWh)	86%
Ex-Post Net Demand Reduction (kW)	293%
Participation (projects)	72%
Budget vs Spend	89%

TABLE 6-17 HVAC PERFORMANCE METRICS

Metric	PY2025
Number of Projects	11
Incentive Spend (\$)	\$9,300.00
Net Target Energy Savings	120,109
Ex-Ante Gross Energy Savings	140,637
Ex-Post Gross Energy Savings	103,847
Ex-Post Net Energy Savings	103,847
Net Target Demand Savings	18.88
Ex-Ante Demand Savings	71.49
Ex-Post Gross Demand Savings	55.26
Net Ex-Post Demand Savings	55.26

6.4.6 Midstream

The Midstream channel of CEEP encourages customers to participate by providing point of sale (POS) discounts on selected products through local lighting distributors. Through this channel, financial

incentives are paid to the lighting distributor to allow reduced costs for the end customer. Energy savings associated with the Midstream channel are calculated using custom calculations developed by the program implementer, CLEAResult. The custom calculations are based on the mix of facility types in the OG&E service territory to determine baseline lamp wattages and the distribution of facility types which allows for deemed hours from the AR TRM v10.0 to be applied to local market conditions. The combination of baseline lamp wattages blended deemed annual operating hours, and program tracking data of actual counts and wattages of lamps sold allow for custom savings calculations to be performed. This channel accounts for 10% of program ex-ante kWh savings.

TABLE 6-18 MIDSTREAM ACHIEVEMENTS

Channel	Percentage of PY2025 Target Achieved
Ex-Post Net Energy Savings (kWh)	135%
Ex-Post Net Demand Reduction (kW)	163%
Participation (projects)	72%
Budget vs Spend	89%

TABLE 6-19 MIDSTREAM PERFORMANCE METRICS

Metric	PY2025
Number of Projects	101
Incentive Spend (\$)	\$220,215.00
Net Target Energy Savings	4,245,060
Ex-Ante Gross Energy Savings	4,970,591
Ex-Post Gross Energy Savings	5,715,989
Ex-Post Net Energy Savings	5,715,989
Net Target Demand Savings	667.39
Ex-Ante Demand Savings	999.99
Ex-Post Gross Demand Savings	1,084.66
Net Ex-Post Demand Savings	1,084.66

6.4.7 Net Impact Findings

6.4.7.1 Free-ridership and Spillover Findings

As discussed in Section 3.1.2 the Evaluator used responses to participant surveys to develop net savings for CEEP. The table below summarizes the results of the effort.

TABLE 6-20 SUMMARY OF NET SAVINGS DATA COLLECTION

Channel	Type of Data Collection	Ex-Post Net Energy Savings kWh	Net-to-Gross Ratio	Population Targeted	Number of Surveys Completed	Absolute Precision (90% Conf. Level)
C&I Solutions	Participant Survey	9,475,177	91.70%	94	8	14.80%
SBS	Participant Survey	1,680,382	100.00%	51	1	NA
CEI	Participant Survey	3,967,443	100.00%	6	1	NA

HVAC	Participant Survey	103,847	100.00%	0	0	NA
Midstream	Participant Survey	5,715,989	100.00%	29	3	NA

Table 6-21 summarizes the estimated free-ridership, spillover, and net-to-gross ratios for the estimates developed through self-report.

TABLE 6-21 SUMMARY OF FREE-RIDERSHIP, SPILLOVER, AND NET-TO-GROSS RATIOS DEVELOPED THROUGH SELF REPORT

Channel	Free-Ridership	Spillover	NTG Ratio
CEI	0.0%	0.0%	100.0%
Midstream	0.0%	0.0%	100.0%
SBS	0.0%	0.0%	100.0%
Large C&I/SAGE	8.3%	0.0%	91.7%

The gross and net ex-post energy savings (kWh) and demand response (kW) of the CEEP are summarized in Table 6-22.

TABLE 6-22 GROSS EX-POST AND NET EX-POST KWH BY CHANNEL

Channel	Ex-Ante Gross kWh Savings	Ex-Post Gross kWh Savings	NTG	Ex-Post Net kWh Savings
C&I Solutions	9,855,218	10,299,105	92.0%	9,475,177
SAGE	1,413,483	1,451,455	92.0%	1,335,339
SBS	1,673,741	1,680,382	100.0%	1,680,382
CEI	3,775,846	3,967,443	100.0%	3,967,443
HVAC	140,637	103,847	100.0%	103,847
Midstream	4,970,591	5,715,989	100.0%	5,715,989
Totals	21,829,515	23,218,222	96.0%	22,278,177

Sums may differ due to rounding.

TABLE 6-23 GROSS EX-POST AND NET EX-POST KW BY CHANNEL

Channel	Ex-Ante Gross kW Savings	Ex-Post Gross kW Savings	NTG	Ex-Post Net kW Savings
C&I Solutions	1,287.69	1,321.49	92.0%	1,215.77
SAGE	217.25	221.22	92.0%	203.52
SBS	280.20	285.49	100.0%	285.49
CEI	855.57	919.00	100.0%	919.00
HVAC	71.49	55.26	100.0%	55.26
Midstream	999.99	1,084.66	100.0%	1,084.66
Totals	3,712.19	3,887.12	96.0%	3,763.70

Sums may differ due to rounding.

6.4.8 Non-Energy Benefits Findings

Per Protocol L of the Arkansas TRM v10.0, the Evaluator calculated NEB for the program. Program measures provide the following categories of NEB:

- Benefits of electricity, natural gas, and liquid propane³³ savings as in ‘other fuel’ savings;
- Benefits of public water and wastewater savings; and
- Benefits of avoided replacement costs.

The NEBs attributable to the CEEP are presented below. Section 3.1.3 discusses the methods used to calculate the NEBs.

Measures with zero entries are included to ensure consistency of table structure and to demonstrate that no measures or potential energy and non-energy impacts were omitted.

6.4.8.1 NEB Summary

The following tables summarize the CEEP NEBs.

³³ Though propane savings (‘other fuel’) were zero (0) in PY2025, we include this here to provide a comprehensive description of the measure offerings.

TABLE 6-24 SUMMARY OF COMMERCIAL AND INDUSTRIAL SOLUTIONS PROGRAM EX-POST GROSS NEB BY MEASURE TYPE

Channel	Measure	Ex-Post Gross Natural Gas Savings (therms)	Ex-Post Gross Water (Gallons)	Ex-Post Gross Propane	Ex-Post Gross ARC (\$)	Ex-Post Gross DRC (\$)
C&I Solutions	Custom	0	0	0	\$0	\$0
C&I Solutions	LED Retrofit	-6,342	0	0	\$15,603	\$0
SAGE	LED Retrofit	-10,153	0	0	\$34,614	\$0
SAGE	Custom	0	0	0	\$0	\$0
SBS	LED Retrofit	-9,939	0	0	\$58,026	\$0
SBS	Exit Signs	-20	0	0	\$34	\$0
SBS	Door Gaskets	0	0	0	\$0	\$0
SBS	Lighting Controls	-15	0	0	\$167	\$0
SBS	Strip Curtains	0	0	0	\$0	\$0
CEI	CEI Milestone	0	0	0	\$0	\$0
CEI	CEI Measure	0	0	0	\$0	\$0
HVAC	Modeled	0	0	0	\$0	\$0
HVAC	M&V	0	0	0	\$0	\$0
Midstream	Linear Lamp T8 LED - 4 ft & U-Bend	-327	0	0	\$2,049	\$0
Midstream	Lowbay/Highbay LED 61-100 Watts	-3,241	0	0	\$30,991	\$0
Midstream	Lowbay/Highbay LED >100 Watts	-38,569	0	0	\$194,866	\$0
Midstream	2x2 Troffer and Linear Ambient LED w/Controls	-46	0	0	\$203	\$0
Midstream	2x4 Troffer and Linear Ambient LED	-648	0	0	\$3,567	\$0
Midstream	2x4 Troffer and Linear Ambient LED w/Controls	-326	0	0	\$1,644	\$0
Midstream	Exterior Wall Pack/Flood 30-80 Watts	0	0	0	\$3,769	\$0
Midstream	Exterior Wall Pack/Flood >80 Watts	0	0	0	\$16,837	\$0
Total		-69,627	0	0	\$362,369	\$0
Sums may differ due to rounding.						

TABLE 6-25 SUMMARY OF COMMERCIAL AND INDUSTRIAL SOLUTIONS PROGRAM EX-POST NET NEB BY MEASURE TYPE

Channel	Measure	Ex-Post Net Natural Gas Savings (therms)	Ex-Post Net Water (Gallons)	Ex-Post Net Propane	Ex-Post Net ARC (\$)	Ex-Post Net DRC (\$)
C&I Solutions	Custom	0	0	0	\$0	\$0
C&I Solutions	LED Retrofit	-5,835	0	0	\$14,355	\$0
SAGE	LED Retrofit	-9,341	0	0	\$31,845	\$0
SAGE	Custom	-	0	0	\$0	\$0
SBS	LED Retrofit	-9,939	0	0	\$58,026	\$0
SBS	Exit Signs	-20	0	0	\$34	\$0
SBS	Door Gaskets	-	0	0	\$0	\$0
SBS	Lighting Controls	-15	0	0	\$167	\$0
SBS	Strip Curtains	-	0	0	\$0	\$0
CEI	CEI Milestone	-	0	0	\$0	\$0
CEI	CEI Measure	-	0	0	\$0	\$0
HVAC	Modeled	-	0	0	\$0	\$0
HVAC	M&V	-	0	0	\$0	\$0
Midstream	Linear Lamp T8 LED - 4 ft & U-Bend	-327	0	0	\$2,049	\$0
Midstream	Lowbay/Highbay LED 61-100 Watts	-3,241	0	0	\$30,991	\$0
Midstream	Lowbay/Highbay LED >100 Watts	-38,569	0	0	\$194,866	\$0
Midstream	2x2 Troffer and Linear Ambient LED w/Controls	-46	0	0	\$203	\$0
Midstream	2x4 Troffer and Linear Ambient LED	-648	0	0	\$3,567	\$0
Midstream	2x4 Troffer and Linear Ambient LED w/Controls	-326	0	0	\$1,644	\$0
Midstream	Exterior Wall Pack/Flood 30-80 Watts	0	0	0	\$3,769	\$0
Midstream	Exterior Wall Pack/Flood >80 Watts	0	0	0	\$16,837	\$0
Total		-68,307	0	0	\$358,352	\$0
Sums may differ due to rounding.						

TABLE 6-26 SUMMARY OF CEEP NPV OF NEB

Channel	NPV NGS (\$)	NPV LPGS (\$)	NPV Water (\$)	NPV ARC (\$)	NPV DRC (\$)
Midstream	-\$221,337	\$0	\$0	\$253,926	\$0
Small Business Solutions	-\$53,742	\$0	\$0	\$58,227	\$0
Schools and Government Efficiency	-\$50,357	\$0	\$0	\$31,845	\$0
Large C&I	-\$31,457	\$0	\$0	\$14,355	\$0
Commercial HVAC	\$0	\$0	\$0	\$0	\$0
Continuous Energy Improvement	\$0	\$0	\$0	\$0	\$0
Total	-\$356,892	\$0	\$0	\$358,352	\$0
Sums may differ due to rounding.					

6.4.9 Process Evaluation Findings

6.4.9.1 Program Activity Summary

Table 6-27 summarizes the measure types implemented through the CEEP channels.

- Large C&I projects accounted for the highest share of total ex-ante savings, with Motors/VFDs representing the majority of savings within this channel. Motors/VFDs delivered 6,191,485 kWh, or 62.8% of Large C&I savings, followed by LED retrofits at 19.2% and other measures at 9.5%. The remaining categories—Compressed Air, Process Equipment, HVAC and Controls, and Refrigeration—each contributed less than 6% of channel savings. This channel showed the greatest diversification from lighting measures among the mixed measure channels.
- Midstream lighting measures contributed substantial savings, driven almost entirely by LED fixtures. LED fixtures generated 4,933,745 kWh, representing 99.3% of Midstream savings, while LED bulbs contributed 0.7%.
- CEI Measures produced 3,775,846 kWh across four projects.
- HVAC Tune-up activity was limited but yielded savings across ten projects. These projects produced 140,637 kWh in total.
- SAGE savings primarily stemmed from LED retrofits. LED measures accounted for 1,364,617 kWh, or 96.5% of SAGE savings, while HVAC and Controls contributed 3.5%.
- SBS savings were dominated by LED retrofits, with several small contributing measures. LED retrofits accounted for 1,643,905 kWh (98.2%). Door gaskets, strip curtains, exit signs, and lighting controls each represented less than 1% of total SBS savings. This distribution of measure types was consistent with small business programs.

TABLE 6-27 CEEP MEASURE SUMMARY

Channel	Measure Type	Projects	Ex-Ante kWh Savings	Percent of Channel Ex-Ante kWh
CEI	CEI Measure	4	3,775,846	100.0%
	CEI Milestone	1	0	0.0%
HVAC Tune-up	HVAC Tune-up	10	140,637	100.0%
Large C&I	Motors/VFDs	16	6,191,485	62.8%
	LED Retrofit	7	1,895,535	19.2%
	Other	1	932,335	9.5%
	Compressed Air	4	553,993	5.6%
	Process Equipment	1	153,051	1.6%
	HVAC and Controls	3	114,711	1.2%
	Refrigeration	1	14,109	0.1%
Midstream	Midstream Lighting: LED Fixture	81	4,933,745	99.3%
	Midstream Lighting: LED Bulb	4	36,845	0.7%
SAGE	LED Retrofit	14	1,364,617	96.5%
	HVAC and Controls	1	48,866	3.5%
SBS	LED Retrofit	51	1,643,905	98.2%
	Door Gaskets	7	15,807	0.9%
	Strip Curtains	5	8,149	0.5%
	Exit Signs	2	3,390	0.2%
	Lighting Controls	1	2,490	0.1%

Table 6-28 summarizes the trade ally activity across the channels, excluding CEI and HVAC Tune-ups. Large C&I savings were overwhelmingly associated with self-installed projects or cases when the trade ally was not listed. Projects that were either self-install or where the trade ally was not listed accounted for 24 of 29 projects and 8,756,887 kWh, or 88.9% of Large C&I savings. Trade Ally 2 was the only trade ally with a notable share in this channel, contributing 950,916 kWh (9.6%) across 3 projects, while the rebate processor and Trade Ally 6 each contributed less than 1% of Large C&I savings.

Midstream savings were primarily delivered through a single distributor. Distributor 1 implemented 82 of 83 Midstream projects and accounted for 4,968,764 kWh, or 100.0% of Midstream savings. Distributor 2 completed 1 project and contributed 1,826 kWh, representing less than 0.1% of savings.

SAGE activity was split between self-install customers and a small number of active trade allies, with self-install projects representing the majority of savings. Not listed/self install projects accounted for 7 of 15 SAGE projects and 777,582 kWh, or 55.0% of SAGE savings. Trade Ally 2 contributed 337,316 kWh (23.9%) across 5 projects, Trade Ally 5 contributed 211,006 kWh (14.9%) across 2 projects, and Trade Ally 7 contributed 87,579 kWh (6.2%) from 1 project.

SBS savings were concentrated among a small set of active trade allies, with Trade Ally 2 playing a leading role. Trade Ally 2 completed 31 of 59 SBS projects and delivered 1,131,048 kWh, or 67.6% of SBS savings. Trade Ally 10 and Trade Ally 4 contributed 278,319 kWh (16.6%) and 138,229 kWh (8.3%), respectively. Self-install SBS projects were limited, with not listed/self install accounting for 3 projects and 86,141 kWh (5.1%), while Trade Allies 9 and 3 together contributed less than 3% of SBS savings.

Overall program delivery relied on a small number of key trade allies and a substantial share of projects that were either self-installed or reported without a listed trade ally, depending on the channel. Large C&I and SAGE channels were dominated by self-installed or not-listed projects, indicating that many larger or more customized projects may have been completed directly by customers or by contractors who were not recorded in the program database. In contrast, Midstream and SBS channels depended on a few specific trade allies, particularly Trade Ally 1 for Midstream and Trade Ally 2 for SBS.

TABLE 6-28 CEEP TRADE ALLY PARTICIPATION SUMMARY

Channel	Trade Ally	Projects	Ex-Ante kWh Savings	Percent of Channel kWh
Large C&I	Not listed/Self install	24	8,756,887	88.9%
	Trade Ally 2	3	950,916	9.6%
	Rebate Processor	1	84,445	0.9%
	Trade Ally 6	1	62,971	0.6%
Midstream	Distributor 1	82	4,968,764	100.0%
	Distributor 2	1	1,826	<0.1%
SAGE	Not listed/Self install	7	777,582	55.0%
	Trade Ally 2	5	337,316	23.9%
	Trade Ally 5	2	211,006	14.9%
	Trade Ally 7	1	87,579	6.2%
SBS	Trade Ally 2	31	1,131,048	67.6%
	Trade Ally 10	12	278,319	16.6%
	Trade Ally 4	4	138,229	8.3%
	Not listed/Self install	3	86,141	5.1%
	Trade Ally 9	8	23,956	1.4%
	Trade Ally 3	1	16,048	1.0%

6.4.9.2 C&I Downstream Participant Survey Findings

This section summarizes findings from the survey of customers that participated in the OG&E Small Business Solutions, C&I Solutions, and Sage channels. Due to the limited number of responses in each Channel, the results are presented together.

6.4.9.2.1 PROGRAM AWARENESS AND DECISION FACTORS

Most respondents learned about the CEEP Channels through CLEAResult, followed by contractors and friends or colleagues. Smaller numbers of respondents reported learning about the program through an OG&E Account Representative or Customer Service Representative or through OG&E's website (see Figure 6-1).

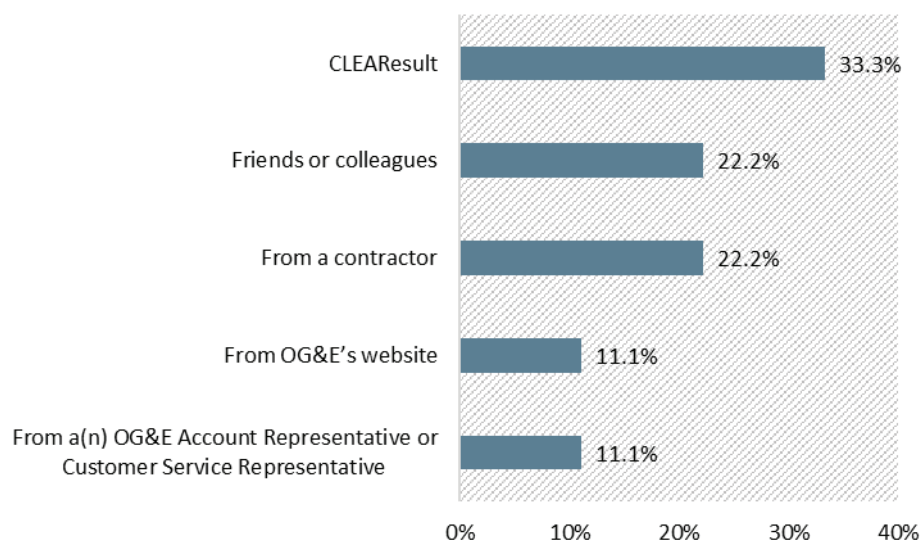


FIGURE 6-1 SOURCES OF PROGRAM AWARENESS (N = 9)

A large share of respondents cited saving energy as the primary factor in deciding to invest in energy efficiency, with 78% selecting this motivation (Table 6-29). More than half (56%) reported participating to obtain an incentive, and 44% sought to save money on utility bills. One-third identified replacing older but still operational equipment and helping protect the environment as important factors.

Less frequently cited motivations included reducing maintenance costs (22%), acquiring newer technology (22%), and achieving carbon reduction or broader environmental goals (22%). Recommendations from family, friends, or colleagues were also noted by 22% of respondents. Replacing broken equipment (11%) and recommendations from an OG&E program contact (11%) were the least common factors.

TABLE 6-29 IMPORTANT FACTORS IN DECISION TO INVEST IN ENERGY EFFICIENCY

Response	Percentage of Responses (n = 9)
To save energy	77.8%
To obtain the incentive	55.6%
To save money on utility bills	44.4%
To replace old, but still working, equipment	33.3%
To help protect the environment	33.3%
To reduce maintenance costs	22.2%
To acquire the latest technology	22.2%
To achieve carbon reduction/environmental goals	22.2%
Recommended by family/ friend /colleague	22.2%
To replace broken equipment	11.1%
Recommended by program contact at OG&E	11.1%

6.4.9.2.2 PROGRAM PARTICIPATION AND APPLICATION EXPERIENCE

Most respondents reported receiving program support during participation. Specifically, 72% reported receiving technical services to help identify or select equipment, while 29% reported not receiving

technical services. Similarly, 72% reported working on the incentive application, and 29% reported not working on the application.

Among respondents who worked on the application, assistance sources varied. Two respondents reported receiving assistance from a contractor, one reported completing the application independently, one reported receiving assistance from OG&E, and one reported receiving assistance from CLEAResult. The respondent who completed the application independently reported that the application process was very easy.

Contractor selection methods varied across respondents. One respondent selected a contractor through a word-of-mouth recommendation, while another selected a contractor from the OG&E website or approved trade ally list.

The SBS respondent reported receiving an energy assessment from the contractor that included specific equipment recommendations. This respondent strongly agreed that the assessment was comprehensive, the contractor provided sufficient information to support decision-making, the contractor was knowledgeable about the OG&E program, the incentive amount was clearly stated in the proposal, and the project was completed in a timely manner. This respondent also reported that equipment installation occurred within 15 days of signing the agreement.

6.4.9.2.3 BARRIERS

A large share of respondents identified high initial cost as the primary barrier to improving commercial and industrial energy efficiency, with 88.9% selecting this challenge. Long payback periods were the next most frequently cited challenge at 22.2%. Funding competition with other organizational investments, lack of awareness about available incentives, and having no challenges or barriers were each selected by 11.1% of respondents (see Figure 6-2).

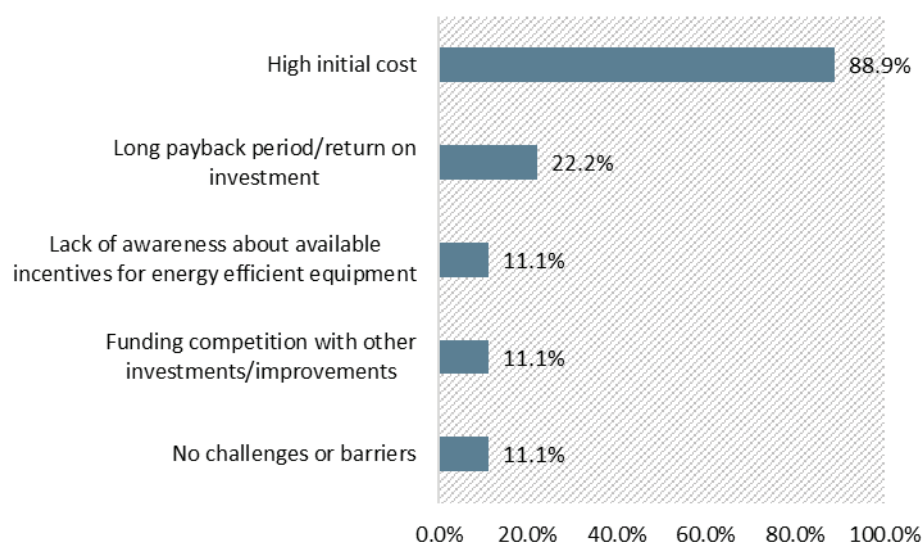


FIGURE 6-2 CHALLENGES THAT ORGANIZATIONS FACE WHEN CONSIDERING ENERGY EFFICIENCY IMPROVEMENTS (N = 9)

Participant Satisfaction

A large share of respondents reported satisfaction with the CEEP. Very satisfied ratings were reported by 88.9% of respondents for the CEEP overall, compared with 55.6% for OG&E as the service provider. Somewhat satisfied ratings accounted for 11.1% of responses for the CEEP and 33.3% for OG&E. No respondents selected neutral or somewhat dissatisfied for either item, while 11.1% expressed very dissatisfied ratings for OG&E (see Table 6-30).

TABLE 6-30 SATISFACTION WITH CEEP AND OG&E

Response	Satisfaction with CEEP Overall (n = 9)	Satisfaction with OG&E as Service Provider (n = 9)
Very satisfied	88.9%	55.6%
Somewhat satisfied	11.1%	33.3%
Neither	0.0%	0.0%
Somewhat dissatisfied	0.0%	0.0%
Very dissatisfied	0.0%	11.1%

Respondents who provided qualitative feedback cited ease of participation, clarity of the application and incentive process, timely assessments and installation, positive experiences working with contractors, and appreciation for incentive support. One respondent noted that while program staff were knowledgeable and easy to work with, incentive levels and custom program opportunities were more limited relative to other utilities.

A large share of respondents reported that the roles directly connected to delivering the program, specifically OG&E representatives and contractors, had a meaningful influence on their decision to install energy-efficient equipment. Among respondents for whom an OG&E representative was applicable, more than half rated the representative's influence as a four or five, indicating that guidance from program staff often played an important part in moving projects forward. Contractors were involved in all projects, and nearly half of respondents rated their influence as a four or five as well, showing that installers also contributed to decision-making for many participants.

In contrast, vendors and designers or architects were either less frequently involved or had limited reported influence. Over half of respondents indicated that vendors were not applicable to their project, and more than two-thirds reported the same for designers or architects. Among the smaller groups who did interact with these channels, influence ratings were mixed and did not show a consistent pattern.

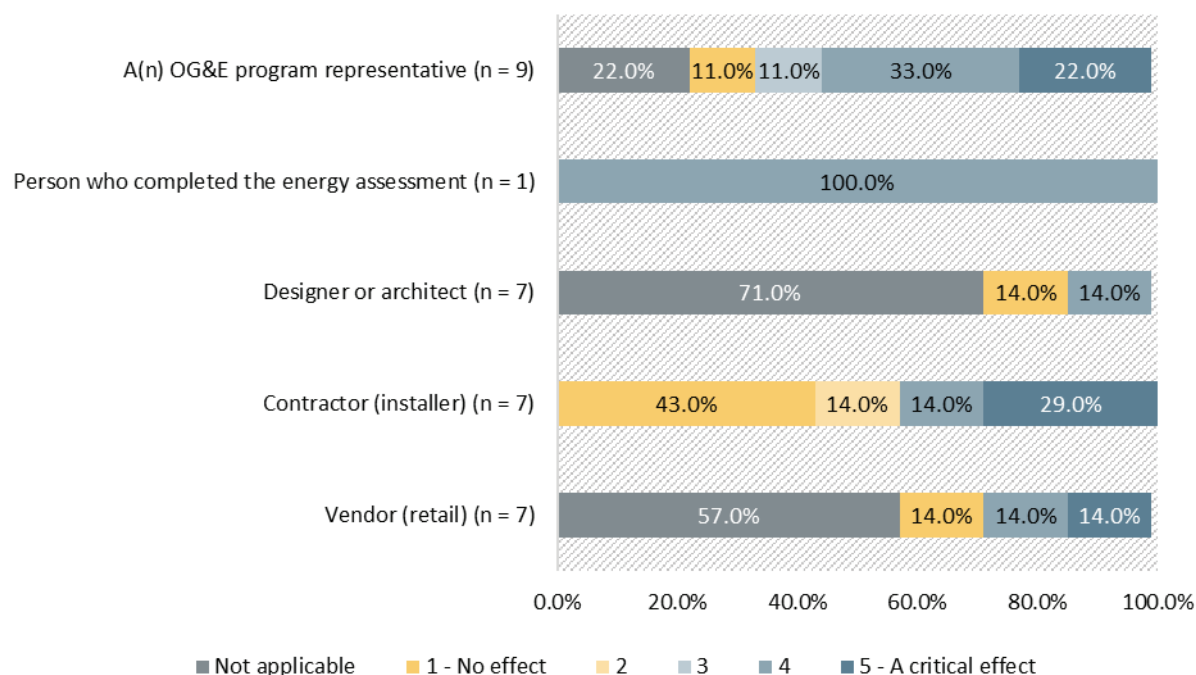


FIGURE 6-3 INFLUENCE OF KEY PARTIES ON THE DECISION TO INSTALL ENERGY EFFICIENT EQUIPMENT

6.4.9.3 Midstream Participant Survey

The following summarizes the three responses obtained from customer who made purchases discounted through the midstream program.

All three respondents were aware of the OG&E midstream discount and that the discount was a key factor in purchase decisions. Among the three respondents, two identified the availability of the OG&E discount as very important to their purchase decision, and two rated distributor recommendations as very important, with the remaining respondent rating distributor recommendations as moderately important. Other information sources were less consistently influential across respondents. Promotional or marketing materials were rated as very important by two respondents but not important by one respondent. Information provided by an OG&E representative was rated as very important by two respondents, while the third respondent indicated this factor was not applicable. Contractor recommendations were generally not influential, with most respondents indicating that this factor did not apply to their purchase decision.

All respondents indicated they were aware that the equipment was discounted from its normal selling price and that OG&E provided the discount. Two respondents selected the Midstream offering because of program-related considerations: one cited reduced effort relative to rebate programs, and one cited uncertainty about rebate availability at the time of purchase.

Respondents also reported high satisfaction with the performance of the discounted equipment. Two of the three respondents indicated that the equipment met expectations very well, while one respondent reported slightly lower performance. Across all respondents, this resulted in an average satisfaction rating

of 4.7 on a 5-point scale, suggesting that customers generally perceived the discounted equipment to perform as expected.

6.4.9.4 CEI Participant Interview

6.4.9.4.1 PARTICIPANT BACKGROUND AND PROGRAM AWARENESS

The interviewee is involved in sustainability-related activities and at the time of the interview, interviewee reported less than one year of direct involvement with the CEI program.

The interviewee became involved with CEI after transitioning into their current role and was invited to participate in ongoing meetings led by facility staff. CEI participation at the facility predated the interviewee's role.

The CEI program was described to the interviewee as a partnership with OG&E focused on identifying energy-saving opportunities across the manufacturing plant and associated facilities, including office space. The interviewee characterized the program as straightforward and indicated that participation in early meetings was sufficient to understand program objectives.

6.4.9.4.2 MOTIVATIONS FOR PARTICIPATION

The interviewee indicated that participation in the CEI program was primarily motivated by anticipated energy savings and associated cost reductions. They did not identify employee engagement as a motivating factor for joining the program. The interviewee explained that they had limited insight into the original enrollment decision, as their involvement with the program began only after stepping into a new role.

6.4.9.4.3 ENERGY MANAGEMENT ROLES AND ACTIONS

The interviewee reported that the company does not have a formal position dedicated to energy management or sustainability. While the interviewee leads a voluntary committee that incorporates sustainability topics, responsibility for sustainability-related activities is informal and distributed among committee members. According to the interviewee, committee-led efforts primarily focused on low-cost behavioral actions, such as recycling initiatives and placing signage on office thermostats to encourage efficient temperature settings during non-business hours.

The committee also discussed installing smart or programmable thermostats to improve control over temperature settings. However, this action was not implemented due to capital cost constraints and a broader pause on capital expenditures at the facility. The interviewee noted that this measure remains of interest and may be reconsidered when financial conditions allow.

6.4.9.4.4 BARRIERS TO IMPLEMENTATION

The interviewee identified capital costs as the primary barrier delaying implementation of smart thermostats. They did not identify internal buy-in, technical feasibility, staffing, or operational disruption as barriers and noted that maintenance leadership supported the measure. The delay was characterized as financial rather than due to lack of interest or feasibility.

6.4.9.4.5 PROGRAM IMPROVEMENTS AND PERCEPTIONS

The interviewee indicated that the program could be more useful by providing clearer prioritization of recommended measures, particularly based on cost, savings potential, implementation time, and

operational impact, as well as support for internal buy-in. The interviewee identified CEI meetings as a program strength, noting that progress reviews and data on energy and cost savings were helpful. No specific process improvements were identified.

The interviewee suggested that financial support or cost-sharing would be the most effective way for OG&E to reduce implementation barriers and improve customer satisfaction. They also noted that program awareness may be limited and that clearer outreach and communication of benefits could encourage broader participation.

Overall, the interviewee reported no drawbacks or complications associated with CEI participation and characterized the program as a positive offering.

6.4.10 Protocol A Database Review

The tracking system in the database conforms reasonably well to the tracking system protocol developed for use in Arkansas. The table below shows a summary of how well the program tracking systems met the components of the protocol.

TABLE 6-31 CEEP PROTOCOL A SUMMARY

Category	Field	Status	Description of Issue(s)
Participating Customer Information	Unique customer identifier, such as account number	✓	
	Customer contact information – name, mailing address, telephone number	✓	
	Date/s of major customer milestones such as rebate application date, approval date, rebate processing date, etc.	✓	
Measure-Specific Information	Measure Group (Equipment Type)	✓	
	Equipment Fuel/Energy Source	✓	
	Equipment Quantity	✓	
	Efficiency Level	✓	
	Estimated Savings	✓	
	Estimated incremental measure cost	✓	
	Equipment Useful Life	✓	
	Measure Name – Text Description	✓	
	Measure Name – Numerical Code	N/A	
	Serial Number	✓	
	Reported age of equipment replaced	N/A	
	Reported measure type of equipment replaced	✓	
	Other inputs necessary for the use and compliance with the TRM	✓	
Vendor-Specific Information	Name and Contact Information for Contractor	✓	
	Contractor Type	✓	
	Date of Installation	✓	
	Cost of the installed equipment	✓	
	Efficiency level of the installed equipment	✓	

Program Tracking Information	Date of the initial program contact/rebate information	✓	
	Date of rebate/incentive paid	✓	
	Incentive amount paid to-date	✓	
	Incentive amounts remaining	✓	
	Application Status (i.e., number of applications approved, pending, or denied)	✓	
	Reason and reason code for application denial	✓	
Program Costs	Overall program budgets	✓	
	Program expenditures to-date	✓	
	Incentive Costs	✓	
	Administrative Costs	✓	
	Marketing/Outreach Costs	✓	
	Evaluation Costs	✓	
Marketing and Outreach Activities	Advertising and marketing spending levels	-	Not itemized from total marketing costs in data provided to the Evaluator.
	Media schedules	N/A	
	Summary of number of community events/outreach activities	✓	
	Other media activities – estimated impressions via mailings, television/radio; print ads.	✓	

6.5 Key Findings and Recommendations

The marketing strategy relies heavily on relationship-based, direct engagement rather than broad outreach, which aligns with program design but limits reach to customers without existing touchpoints.

Marketing and outreach are primarily delivered through account executives, community affairs staff, and CLEAResult's local teams, with no paid media or large-scale advertising. This model leverages trusted relationships, particularly for C&I Solutions, SAGE, and CEI. Survey findings reflect this structure: most downstream participants first learned about the program from CLEAResult or contractors, with relatively few citing OG&E representatives or the website.

Customer awareness is shaped primarily by intermediaries rather than by OG&E-owned marketing channels. Although program materials use consistent themes emphasizing cost savings, incentives, and expert guidance, downstream customers typically learn about the program through CLEAResult staff, contractors, or colleagues, and midstream participants rely heavily on distributor recommendations and the availability of point-of-sale discounts. Only a small share of respondents reported learning about the program through the OG&E website or direct OG&E communications. This pattern reflects the program's delivery model, where trade allies, distributors, and outreach staff serve as the primary marketing touchpoints rather than OG&E-owned channels.

Trade allies are integral to program delivery, especially for Small Business Solutions, and the implementer provides structured recruitment, onboarding, and training to support their role. Trade allies serve as the primary delivery partners for small business projects and support C&I and SAGE

customers when installation services are required. Recruitment is targeted toward contractors capable of delivering lighting and other eligible small-business measures, and customers receive an approved trade ally list to facilitate project completion. The implementation contractor provides annual kickoff trainings, onboarding for new trade allies, and additional training when program requirements or tools change. This structured approach ensures that trade allies remain informed about program processes, documentation requirements, and qualified products.

Overall, the QA/QC framework appears appropriately scaled to the risk profile and delivery characteristics of each channel. Higher-risk programs receive more intensive verification, while lower-risk or market-based offerings rely on data-driven controls. Interviews did not identify material gaps in inspection coverage or independence of review, and the division of responsibilities between the implementer and OG&E provides separation between delivery, verification, and incentive payment functions.

This framework is implemented through channel-specific QA/QC requirements managed by a team separate from program delivery. All channels undergo desk reviews to verify documentation completeness, savings calculations, and equipment eligibility. Field inspection protocols vary by program type: Small Business Solutions applies a graduated inspection model, including 100% inspections for new or probationary trade allies and randomized post-installation inspections thereafter that often exceed the 20% minimum requirement. C&I Solutions and SAGE require 100% pre- and post-installation inspections for all projects, supplemented by engineering review for custom measures. In the midstream channel, QA/QC focuses on data integrity and incentive application, including cross-checks to prevent double counting. CEI relies on performance-based verification using modeled baselines rather than installation-level review. In addition to implementer-managed QA/QC activities, OG&E conducts monthly data reviews and semiannual reconciliation of incentive payments, providing an additional layer of oversight.

The portfolio's measure mix follows patterns typical of C&I programs where lighting measures are the primary contributor to savings in programs targeting the small business, schools, governments, and nonprofits segments. Notably, the Large C&I and CEI channels have achieved meaningful diversification beyond lighting, with non-lighting measures, including those identified through CEI strategic energy management process, accounting for a substantial share of savings in those segments. As lighting markets approach saturation in future years, sustaining portfolio-wide savings will depend on broadening this kind of end-use diversity into smaller customer segments, particularly through expanded participation in HVAC, refrigeration, and controls. Building out contractor networks with expertise in these end uses is a logical near-term step toward that goal.

- **Recommendation 1:** To strengthen long-term program performance and reduce reliance on lighting-driven savings, the program should expand its development and promotion of non-lighting opportunities across both the SBS and SAGE channels. This should include (1) identifying and recruiting contractors that specialize in refrigeration services, HVAC controls, and building automation systems; (2) integrating these contractors into targeted outreach and project development efforts for small businesses, schools, government entities, and nonprofits; and (3) supporting the creation or refinement of measures and pathways aligned with these end uses.

Enhancing contractor networks and sector-specific engagement will help diversify the measure mix, increase participation in HVAC and refrigeration opportunities, and position the program to maintain robust and sustainable savings as lighting markets continue to evolve.

Large C&I respondents generally reported sufficient support in completing the application or did not experience difficulty completing it independently. Of the five respondents who worked on the application, two reported receiving assistance from the utility or its implementation contractor, and two reported assistance from their own contractor. The respondent who completed the application independently reported that it was very easy to complete.

A substantial share of respondents reported that roles directly involved in program delivery, specifically OG&E representatives and contractors, influenced their decision to install energy-efficient equipment. Among respondents for whom an OG&E representative was applicable, more than half rated the representative's influence as a four or five, indicating that program staff guidance often contributed to project advancement. Contractors were involved in all projects, and nearly half of respondents rated contractor influence as a four or five, indicating that installers also influenced decision-making for many participants.

SBS assessments supported customer decision-making. The SBS respondent reported receiving a comprehensive assessment and having sufficient information to act on the recommended measures.

All SBS and Large C&I respondents reported satisfaction with the program. No respondents reported dissatisfaction, and most reported being very satisfied.

APPENDICES

List of appendices:

Appendix A – Program Surveys;

Appendix B – Cost-effectiveness Analysis;

Appendix C – Survey-based Free-ridership Results;

Appendix D – C&I Site-level Reports; and

Appendix E – Residential Site Visit Findings.

Appendix A Program Surveys

A.1 CEEP Large C&I and SAGE, SBS Participant Survey

1. To begin, we would like to confirm that your organization received an incentive in [YEAR] for completing a [PROJECT_DESCRIPTION] through [UTILITY]'s [PATHWAY_NAME] Program at [LOCATION].

Is that correct?

- 1. Yes
- 2. No [TERMINATE]
- 98. Not sure [TERMINATE]

AWARENESS

2. First, we have a few questions to ask you about your experience with the [UTILITY] [PATHWAY_NAME].

How did you first learn about [UTILITY]'s [PATHWAY_NAME] Program incentives for efficient equipment or upgrades?

- 1. From a [UTILITY] Account Representative or Customer Service Representative
- 2. [DISPLAY IF Large C&I_SAGE = 1] From a contractor
- 3. [DISPLAY IF SBS = 1] From the contractor that completed your energy assessment
- 4. Friends or colleagues
- 5. From [UTILITY]'s website
- 6. Social media post
- 7. Through an internet search (e.g., online search engine)
- 8. Through an internet advertisement
- 9. Through a program sponsored workshop
- 96. Other (Please specify) [OPEN-ENDED]
- 98. Not sure

MOTIVATION

3. Which factors were most important in your decision to invest in an energy efficiency project at your organization? (Please select all that apply) [MULTI-SELECT]

- 1. To save money on utility bills

2. To save energy
3. To reduce maintenance costs
4. To obtain the incentive
5. To acquire the facility assessment
6. To replace old, but still working, equipment
7. To replace broken equipment
8. To acquire the latest technology
9. To help protect the environment
10. To achieve carbon reduction/environmental goals
11. Recommended by program contact at [UTILITY]
12. Recommended by contractors/trade allies
13. Recommended by family/ friend /colleague
14. Part of a broader remodeling or renovation

PROGRAM EXPERIENCES

[Ask Q4 if LARGE C&I_SAGE = 1]

4. The next few questions are about your experience with participating in the program.

Did you receive any technical services through the program that helped you identify or select equipment?
This may have included a facility assessment completed by program staff or a participating contractor.

1. Yes
2. No
98. Not sure

[ASK Q5 if LARGE C&I_SAGE = 1]

5. Did you work on the incentive application(s)?

1. Yes
2. No
98. Not sure

[ASK if Q5 = 1]

6. Did you get help completing the application from someone else? (Please select all that apply).
[MULTI-SELECT]

- 1. No, I filled it out myself [MAKE EXCLUSIVE]
- 2. My contractor helped me
- 3. Someone from OG&E helped me
- 4. Someone else helped me (Please specify). [OPEN-ENDED]
- 98. Not sure [MAKE EXCLUSIVE]

[ASK if Q6= 1]

7. How easy was it for you to fill out the application to receive your incentive?

- 1. Very easy
- 2. Somewhat easy
- 3. Neither easy nor difficult
- 4. Somewhat difficult
- 5. Very difficult
- 98. Not sure

[ASK if Q7 > 3]

8. What was difficult about the incentive application? [OPEN-ENDED]

[ASK if CONTRACTOR = 1]

9. How did you select the contractor who you worked with through the [PATHWAY_NAME] Program?

- 1. It was a contractor I've worked with before
- 2. Word of mouth or recommendation from someone I know
- 3. The contractor cold-called or contacted me
- 4. I found the contractor on my own
- 5. From the OG&E website / approved trade ally list

[Ask if SBS = 1]

10. Did your contractor complete an energy assessment of your building that recommended specific types of equipment?

- 1. Yes
- 2. No
- 98. Not sure

[ASK if SBS =1]

11. How much do you agree with the following statements about the contractor you worked with?

[Scale: 1 = Strongly disagree 2 = Disagree, 3 = Neither agree nor disagree, 4 = Agree, 5= Strongly agree]

- 1. [Display if Q10 = 1] The contractor's energy assessment was comprehensive
- 2. The contractor provided all the information I needed to make a decision
- 3. The contractor was knowledgeable about the OG&E program
- 4. The program incentive amount was clearly stated in the proposal.
- 5. The contractor completed the project in a timely manner

[ASK if Q11a < 3]

12. Why do you think the contractor's energy assessment was not comprehensive? [OPEN-ENDED]

[ASK if Q11b < 3]

13. What additional information could your contractor have provided to help you make your decision?
[OPEN-ENDED]

[ASK if Q11c < 3]

14. Why do you think the contractor the contractor was not very knowledgeable about the OG&E program? [OPEN-ENDED]

[ASK if SBS =1]

15. About how many days did it take your contractor to install the energy efficiency equipment after you signed the agreement to complete the project?

- 1. Less than 15 days
- 2. 15 to 29 days

- 3. 30 to 44 days
- 4. 45 to 60 days
- 5. More than 60 days
- 98. Not sure

16. Did you encounter any of the following challenges while completing the [PROJECT_DESCRIPTION]? Please select all that apply. [Randomize order of 2 – 8] [MULTI-SELECT]

- 1. Did not have any challenges [MAKE ANSWER EXCLUSIVE]
- 2. Difficulty understanding equipment eligibility
- 3. Difficulty finding a trade ally or contractor to complete the project
- 4. Lack of internal support within my company
- 5. Confusion about who to contact for information about the program
- 6. Difficulty understanding the incentive amount
- 7. Difficulty getting the equipment you installed
- 8. Difficulty with the contractor that installed the equipment
- 96. Other challenges
- 98. Not sure [MAKE ANSWER EXCLUSIVE]

[ASK IF Q16=9]

- 17. What other challenges did you face? [OPEN-ENDED]

[ASK if Q16=2-96 is selected]

18. What could [UTILITY] have done to help your organization overcome the challenges you faced on this project? (Please select all that apply). [MULTI-SELECT]

- 1. Provided higher incentives
- 2. More technical/engineering support
- 3. Improve application process
- 4. Make it clearer who to go to for assistance with the application
- 5. Shorten the pre-approval times
- 6. Pay the incentives more quickly
- 7. Provide more information on contractors

8. Nothing else was needed [MAKE ANSWER EXCLUSIVE]

96. Something else (Please describe) [OPEN-ENDED]

BARRIERS

19. When considering improvements to increase commercial and industrial energy efficiency, what are the most significant challenges that your organization faces? (Please select all that apply). [MULTI-SELECT]

1. No challenges or barriers [MAKE ANSWER EXCLUSIVE]

2. High initial cost

3. Understanding potential areas for improvement/lack of technical knowledge

4. Funding competition with other investments/improvements

5. Long payback period/return on investment

6. Lack of awareness about available incentives for energy efficient equipment

7. Lack of corporate support for energy efficiency investments

8. Lack of staff time dedicated to energy efficiency upgrades

9. Don't own building

97. Other (Please specify). [OPEN-ENDED]

98. Not sure [MAKE ANSWER EXCLUSIVE]

PROGRAM SATISFACTION

20. How satisfied are you with [UTILITY]'s [PATHWAY_NAME] program overall? Would you say you are...

1. Very satisfied

2. Somewhat satisfied

3. Neither satisfied nor dissatisfied

4. Somewhat dissatisfied

5. Very dissatisfied

98 Not sure

21. Can you briefly describe why you gave the program that satisfaction rating? [OPEN-ENDED]

22. How satisfied are you with [UTILITY] overall as your organization's utility service provider? Would you say you are...

1. Very satisfied
2. Somewhat satisfied
3. Neither satisfied nor dissatisfied
4. Somewhat dissatisfied
5. Very dissatisfied
98. Not sure

PROGRAM INFLUENCE

23. How much of an effect did each of the following have on the decision to install the energy efficient equipment that you received the program incentive for? Please use a scale where 1 means the person had no effect on the decision and 5 means the person had a critical effect on the decision to install the equipment.

[Scale: 1 = No effect – 5 = A critical effect, 99 = Not applicable]

1. [IF LARGE C&I_SAGE = 1] Vendor (retailer)
2. [IF LARGE C&I_SAGE = 1] Contractor (installer)
3. [IF LARGE C&I_SAGE = 1] Designer or architect
4. [IF SBS = 1] Person who completed the energy assessment
5. A [UTILITY] program representative

FREE-RIDERSHIP

MEASURE 1

24. Not including the project that your organization received an incentive for in [YEAR], has your organization completed any significant energy efficiency projects in the last three years?

1. Yes
2. No
98. Not sure

[Ask Q25 if Q24 = 1]

25. Did you complete any of those projects without receiving a program incentive?

1. Yes

- 2. No
- 98. Not sure

[Ask Q26 if Q24 = 1]

26. In the last three years, did your organization or business complete any energy efficiency projects like the [MEASURE1] project you completed at [LOCATION]? Please consider projects completed at this facility or at another facility operated by your organization.

- 1. Yes
- 2. No
- 98. Not sure

27. Did you have previous experience with the [PATHWAY_NAME] Program prior to [IMPLEMENTING1] the [MEASURE1] in [YEAR]?

- 1. Yes
- 2. No
- 98. Not sure

[Ask Q28 if Q27= 1]

28. How important was your previous experience with the program in making your decision to [IMPLEMENT1] the [MEASURE1] at your facility? Would you say that it was...

- 1. Very important
- 2. Somewhat important
- 3. Only slightly important
- 4. Not at all important
- 98. Not sure

29. Did a [PATHWAY_NAME] Program representative or other [UTILITY] representative recommend that you [IMPLEMENT1] the [MEASURE1] at your facility?

- 1. Yes
- 2. No
- 98. Not sure

[Ask Q30 if Q29 = 1]

30. Was the [MEASURE1] recommended through technical support or the facility assessment that you received?

- 1. Yes
- 2. No
- 98. Not sure

31. Did you have plans to [IMPLEMENT1] the [MEASURE1] at the facility before deciding to participate in the [PATHWAY_NAME] Program?

- 1. Yes
- 2. No
- 98. Not sure

32. Would you have completed the [MEASURE1] project even if you had not participated in the program?

- 1. Yes
- 2. No
- 98. Not sure

[Ask Q33 if Q29 = 1 OR Q30=1]

33. If the [PATHWAY_NAME1] Program representative had not recommended [IMPLEMENTING1] the [MEASURE1], how likely is it that you would have [IMPLEMENTED1] it anyway? Would you say that you...

- 1. Definitely would have
- 2. Probably would have
- 3. Probably would not have
- 4. Definitely would not have
- 98. Not sure

34. Would you have been financially able to [IMPLEMENT1] the [MEASURE1] at your facility if the incentives from the [PATHWAY_NAME1] Program were not available?

- 1. Yes
- 2. No
- 98. Not sure

[Ask Q35 if Q34 = 2]

35. To confirm, your organization would NOT have allocated the funds to complete a similar energy saving project if the program incentive was not available. Is that correct?

- 1. Yes, that is correct.
- 2. No, that is not correct.
- 98. Not sure

[Ask Q36 if Q35 = 2]

36. In your own words, can you tell me what your organization would have likely done if the financial incentive was not available from the program? [OPEN-ENDED]

37. Did the program incentive help the [MEASURE1] project receive approval from your organization?

- 1. Yes
- 2. No
- 98. Not sure

38. If the incentive from the [PATHWAY_NAME] Program had not been available, how likely is it that you would have [IMPLEMENTED1] the [MEASURE1] at your facility anyway? Would you say that you...

- 1. Definitely would have
- 2. Probably would have
- 3. Probably would not have
- 4. Definitely would not have
- 98. Not sure

[Ask Q39 if MEAS_QUANT1 >1]

39. Did you [IMPLEMENT1] more units of [MEASURE1] or complete a bigger project than you otherwise would have without the program?

- 1. Yes

- 2. No
- 98. Not sure

[Ask Q40 if ENERGY_USING1 = 1]

40. Did you choose [MEASURE1B] equipment that was more energy efficient than you would have chosen had you not participated in the program?

- 1. Yes
- 2. No
- 98. Not sure

[Ask Q41 if Q40 =1]

41. What type of equipment, if any, would you have installed if you had not participated in the program? [OPEN-ENDED]

42. Did you [IMPLEMENT1] the [MEASURE1] earlier than you otherwise would have without the program?

- 1. Yes
- 2. No
- 98. Not sure

[Ask Q43 if Q42 = 1]

43. When would you otherwise have [IMPLEMENTED1] the [MEASURE1]? Would you have done it ...

- 1. Within 6 months
- 2. 7 months to 1 year
- 3. More than 1 year up to 2 years
- 4. More than 2 years up to 3 years
- 5. More than 3 years up to 5 years
- 6. More than 5 years
- 98. Not sure

MEASURE 2 [DISPLAY BLOCK IF SECOND_MEASURE = 1]

[Ask if Q24 = 1]

44. The next few questions are about the [MEASURE2] that our records say you also implemented.

In the last three years, did your organization or business complete any energy efficiency projects similar to the [MEASURE2] project completed at [LOCATION]? Please consider projects completed at this facility or at another facility operated by your organization.

1. Yes

2. No

98. Not sure

[Ask if Q27= 1]

45. How important was your previous experience with the program in making your decision to [IMPLEMENT2] the [MEASURE2] at your facility? Would you say that it was...

1. Very important

2. Somewhat important

3. Only slightly important

4. Not at all important

98. Not sure

46. Did a [PATHWAY_NAME] Program representative or other [UTILITY] representative recommend that you [IMPLEMENT2] the [MEASURE2] at your facility?

1. Yes

2. No

98. Not sure

[Ask if Q46 = 1]

47. Was the [MEASURE2] recommended through the technical support or facility assessment that you received?

1. Yes

2. No

98. Not sure

48. Did you have plans to [IMPLEMENT2] the [MEASURE2] at the facility before deciding to participate in the [PATHWAY_NAME] Program?

- 1. Yes
- 2. No
- 98. Not sure

49. Would you have completed the [MEASURE2] project even if you had not participated in the program?

- 1. Yes
- 2. No
- 98. Not sure

[Ask if Q46= 1 OR Q47=1]

50. If the [PATHWAY_NAME] Program representative had not recommended [IMPLEMENTING2] the [MEASURE2], how likely is it that you would have [IMPLEMENTED2] it anyway? Would you say that you...

- 1. Definitely would have
- 2. Probably would have
- 3. Probably would not have
- 4. Definitely would not have
- 98. Not sure

51. Would you have been financially able to [IMPLEMENT2] the [MEASURE2] at your facility if the incentives from the [PATHWAY_NAME2] Program were not available?

- 1. Yes
- 2. No
- 98. Not sure

[Ask if Q51 = 2]

52. To confirm, your organization would NOT have allocated the funds to complete a similar energy saving project if the program incentive was not available. Is that correct?

- 1. Yes, that is correct.
- 2. No, that is not correct.
- 98. Not sure

[Ask if Q52= 2]

53. In your own words, can you tell me what your organization would have likely done if the financial incentive was not available from the program? [OPEN-ENDED]

54. Did the program incentive help the [MEASURE2] project receive approval from your organization?

1. Yes

2. No

98. Not sure

55. If the incentive from the [PATHWAY_NAME] Program had not been available, how likely is it that you would have [IMPLEMENTED2] the [MEASURE2] at your facility anyway? Would you say that you...

1 Definitely would have

2 Probably would have

3 Probably would not have

4 Definitely would not have

98. Not sure

[Ask if MEAS_QUANT2>1]

56. Did you [IMPLEMENT2] more units of [MEASURE2] or complete a bigger project than you otherwise would have without the program?

1. Yes

2. No

98. Not sure

[Ask if ENERGY_USING2 = 1]

57. Did you choose [MEASURE2B] equipment that was more energy efficient than you would have chosen had you not participated in the program?

1. Yes

2. No

98. Not sure

[Ask if Q57 =1]

58. What type of equipment, if any, would you have installed if you had not participated in the program? [OPEN-ENDED]

59. Did you [IMPLEMENT2] the [MEASURE2] earlier than you otherwise would have without the program?

1. Yes

2. No

98. Not sure

[Ask if Q59 = 1]

60. When would you otherwise have [IMPLEMENTED2] the [MEASURE2]? Would you have done it ...

1. Within 6 months

2. 7 months to 1 year

3. More than 1 year up to 2 years

4. More than 2 years up to 3 years

5. More than 3 years up to 5 years

6. More than 5 years

98. Not sure

SPILOVER

61. Since you completed the incentive project, have you installed any energy efficient equipment at a facility that receives electrical service from [UTILITY] and that you DID NOT get an incentive for from [UTILITY]?

1. Yes

2. No [Skip to Firmographics]

98. Not sure

[Ask if Q61 = 1]

62. What additional energy efficient equipment have you installed?

[MULTISELECT]

1. Lighting
2. Lighting controls or occupancy sensors
3. Unitary or split air conditioning system or chiller
4. ENERGY STAR Room air conditioners
5. Efficient motors
6. Refrigeration equipment including LED case lighting)
7. Kitchen equipment
8. Something else [OPEN-ENDED]
96. Didn't implement any measures [MAKE ANSWER EXCLUSIVE] [Skip to Firmographics]
98. Not sure [MAKE ANSWER EXCLUSIVE] [Skip to Firmographics]

[Ask if Q61= 1]

63. Which of the following best describes why you decided to install this equipment without getting a program incentive?

[MULTI SELECT RANDOMIZE 1-7 ORDER]

1. Didn't know whether equipment qualified for financial incentives
2. Equipment did not qualify for financial incentives
3. Too much paperwork for the financial incentive application
4. Financial incentive was insufficient
5. Didn't have time to complete paperwork for financial incentive application
6. Didn't know about financial incentives until after equipment was purchased
7. We did receive an incentive [Skip to Firmographics]
96. Other (Please specify). [OPEN-ENDED]
98. Not sure [MAKE ANSWER EXCLUSIVE]

[Ask if Q61= 1]

64. Did you work with a contractor to install that efficient equipment or did your company's staff install the equipment?

1. Worked with a contractor
2. Company self-installed equipment

3. Both

98. Not sure

LIGHTING

[Ask IF Q62 = 1]

65. What type of lighting did you install?

[MULTISELECT AND RANDOMIZE 1-19]

1. T8 Fluorescent linear lamps – Single (1) lamps
 2. T8 Fluorescent linear lamps – 2 lamp fixtures
 3. T8 Fluorescent linear lamps – 4 lamp fixtures
 4. T8 Fluorescent linear lamps – 6 lamp fixtures
 5. T5 Fluorescent linear lamps – Single (1) lamps
 6. T5 Fluorescent linear lamps – 2 lamp fixtures
 7. T5 Fluorescent linear lamps – 4 lamp fixtures
 8. T5 Fluorescent linear lamps – 6 lamp fixtures
 9. LED Screw-in BAR/R/ER bulbs
 10. LED Screw-in Interior PAR/MR bulbs
 11. LED Screw-in omnidirectional A-line bulbs
 12. LED 2-foot linear replacement lamps
 13. LED 4-foot linear replacement lamps
 14. LED exterior flood or spot luminaires
 15. LED 1x4 panel or troffer
 16. LED 2x2 panel or troffer
 17. LED 2x4 panel or troffer
 18. LED high-bay lighting
 19. LED exit signs
96. Another type
98. Not sure [MAKE ANSWER EXCLUSIVE]

[Ask Q66 IF Q65 = 96]

66. What other type of lighting equipment did you install?

[Ask IF Q62 = 1]

67. About what month and year did you install the lighting?

[REPEAT Q68 - Q71 FOR EACH TYPE SELECTED IN Q65]

68. How many [Q65 RESPONSE] did you install? [OPEN-ENDED]

69. What was the average wattage of the [Q65 RESPONSE]?

70. Were the [Q65 RESPONSE] installed inside a building, outside, or in a parking garage?

1. Inside
2. Outside
3. Parking garage
98. Not sure

[Ask Q71 IF Q70 = 1]

71. What type of building did you install the [Q65 RESPONSE] in?

1. Food Sales
2. Food Service
3. Health Care
4. Hotel/Motel
5. Office
6. Public Assembly
7. Public Services non-food)
8. Retail
9. Warehouse
10. School
11. College
12. Industrial – 1 Shift
13. Industrial – 2 Shift

14. Industrial – 3 Shift

96. Other (Please describe) [OPEN-ENDED]

98. Not sure

[Ask Q72 IF Q70 = 1]

72. Is the inside space heated, cooled, or both?

1. Heated

2. Cooled

3. Both

98. Not sure

73. What type of lighting did the [Q65 RESPONSE] replace?

1. T12s (linear fluorescents)

2. T8s (linear fluorescents)

3. Metal-halide / High-intensity discharge

4. Incandescent

5. [DISPLAY IF Q65 = 9, 11, OR 12] Compact fluorescent CFL

96. Something else [OPEN-ENDED]

98. Not sure

74. What was the average wattage of the old lamps or bulbs? [OPEN-ENDED]

75. How many of the old lamps or bulbs did you remove? [OPEN-ENDED]

[Ask Q76 IF Q65 = 19]

76. Did you install single-sided, double-sided, or both single and double-sided LED exit signs?

1. Single-sided exit signs

2. Double-sided exit signs

3. Both single and double-sided exit signs

98. Not sure

[Ask Q77 IF Q76 = 1 OR Q76 = 3]

77. How many single-sided LED exit signs did you install? [OPEN-ENDED]

[Ask Q78 IF Q76 = 1 OR Q76 = 3]

78. How many double-sided LED exit signs did you install? [OPEN-ENDED]

[Ask Q79 IF Q76 = 98]

79. How many LED exit signs did you install? [OPEN-ENDED]

[Ask Q80 if Q62 =1]

80. How important was your experience with the program in your decision to install this lighting equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask Q81 if Q62 =1]

81. If you had NOT participated in the program, how likely is it that your organization would still have installed this lighting equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask Q82 if Q80=0,1,2,3 AND Q81=0,1,2,3 OR if Q80=8,9,10 AND Q81=8,9,10]

82. You scored the importance of your program experience to your decision to implement additional lighting measures with [Q80 RESPONSE] out of 10 possible points. You ALSO scored the likelihood of implementing additional lighting measures if your organization had not participated in the program with [Q81 RESPONSE] out of 10 possible points.

Can you please explain the role the program made in your decision to implement this measure? [OPEN-ENDED]

LIGHTING CONTROLS

[Ask if Q62 = 2]

83. How many fixtures are being controlled by the lighting controls? [OPEN-ENDED]

[Ask if Q62= 2]

84. On average, how many lamps or bulbs does each fixture contain? [OPEN-ENDED]

[Ask if Q62 = 2]

85. What is the average wattage of these lamps? [OPEN-ENDED]

[Ask if Q62 = 2]

86. Are any of the lighting controls that you installed central time clock controls?

1. Yes

2. No

98. Not sure

[Ask if Q86 = 1]

87. How many of the fixtures are controlled by the central time clock? [OPEN-ENDED]

[Ask if Q62 = 2]

88. What type of building did you install the lighting controls in?

1. Food Sales

2. Food Service

3. Health Care

4. Hotel/Motel

5. Office

6. Public Assembly

7. Public Services non-food)

8. Retail

9. Warehouse

10. School

11. College

12. Industrial – 1 Shift

13. Industrial – 2 Shift

14. Industrial – 3 Shift

16. Other (Please specify). [OPEN-ENDED]

98. Not sure

[Ask if Q62 = 2]

89. How important was your experience with the program in your decision to install lighting controls?

[SCALE 0 “Not at all important” - 10 “Very important”, 98=Not sure]

[Ask if Q62 = 2]

90. If you had NOT participated in the program, how likely is it that your organization would still have installed lighting controls?

[SCALE 0 “Not at all important” - 10 “Very important”, 98=Not sure]

[Ask if [Q89=0,1,2,3 AND Q90=0,1,2,3] OR [Q89=8,9,10 AND Q90=8,9,10]]

91. You scored the importance of your program experience to your decision to implement lighting controls with [Q89 RESPONSE] out of 10 possible points. You ALSO scored the likelihood of implementing lighting controls if your organization had not participated in the program with [Q90 RESPONSE] out of 10 possible points. Can you please explain the role the program made in your decision to implement this measure? [OPEN-ENDED]

HVAC MEASURES

[Ask if Q62 = 3]

92. What types of energy efficient equipment did you install as part of the HVAC project? [MULTI SELECT]

1. Split air conditioning system (A/C system that has an evaporator indoors and the compressor and condenser outdoors.)
2. Packaged air conditioning system (A type of central air conditioning that contains both the air handler fan, compressor and condenser in a single unit. These are typically mounted on the roof.)
3. Heat pump (An electric heating and cooling system)
4. Air cooled chiller (A system that produces cold liquid sent around to individual spaces used for cooling air usually found in larger facilities)
5. Water cooled chiller (A system that produces cold liquid sent around to individual spaces used for cooling air usually found in larger facilities)

96. Another type

98. Not sure [MAKE ANSWER EXCLUSIVE]

[Ask if Q92 = 96]

93. What other type of HVAC equipment did you install? [OPEN-ENDED]

[REPEAT Q94– Q96 for each selected in Q92]

94. We would like to know more about the rated efficiency and number of units of the [Q92 RESPONSE]s that you installed.

For each level of efficiency of the equipment you installed, please provide the rated efficiency and the number of units. [OPEN-ENDED]

95. What type of building did you install heating/cooling equipment in?

1. Grocery

2. High School

3. Hospital

4. Light Industrial

5. Office - Large

6. Office - Small

7. Primary School

8. Religious Worship

9. Restaurant - Fast Food

10. Restaurant - Full Service

11. Retail - Big Box

12. Retail - Large

13. Retail - Small

14. University

15. Warehouse

96. Other (Please specify). [OPEN-ENDED]

98. Not sure

96. What city is the building where you installed the heating/cooling equipment located in? [OPEN-ENDED]

[Ask if Q92 = 1-7]

97. How important was your experience with the program in your decision to install the energy efficient HVAC equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask if Q92 = 1-96]

98. If you had NOT participated in the program, how likely is it that your organization would still have installed the energy efficient HVAC equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask if [Q97=0,1,2,3 AND Q98=0,1,2,3] OR [Q97=8,9,10 AND Q98=8,9,10]]

99. You scored the importance of your program experience to your decision to implement energy efficient HVAC equipment with [Q97 RESPONSE] out of 10 possible points. You ALSO scored the likelihood of implementing the energy efficient HVAC equipment if your organization had not participated in the program with [Q98 RESPONSE] out of 10 possible points. Can you please explain the role the program made in your decision to implement this measure? [OPEN-ENDED]

[Ask if Q62 = 4]

100. How many ENERGY STAR room air conditioners did you install? [OPEN-ENDED]

[Ask if Q62 = 4]

101. What type of building did you install the heating/cooling equipment in?

1. Grocery
2. High School
3. Hospital
4. Light Industrial
5. Office - Large
6. Office - Small
7. Primary School

- 8. Religious Worship
- 9. Restaurant - Fast Food
- 10. Restaurant - Full Service
- 11. Retail - Big Box
- 12. Retail - Large
- 13. Retail - Small
- 14. University
- 15. Warehouse
- 96. Other (Please specify). [OPEN-ENDED]
- 98. Not sure

[Ask if Q62 = 4]

- 102. What city is the building where you installed the room air conditioners located in? [OPEN-ENDED]

[Ask if Q62 = 4]

- 103. How important was your experience with the program in your decision to install the heating/cooling equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask Q104 if Q62 = 4]

- 104. If you had NOT participated in the program, how likely is it that your organization would still have installed the heating/cooling equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask if [Q103=0,1,2,3 AND Q104=0,1,2,3] OR [Q103=8,9,10 AND Q104=8,9,10]]

- 105. You scored the importance of your program experience to your decision to install the energy efficient air conditioners with [Q103 RESPONSE] out of 10 possible points. You ALSO scored the likelihood of installing the energy efficient air conditioners if your organization had not participated in the program with [Q104 RESPONSE] out of 10 possible points. Can you please explain the role the program made in your decision to implement this measure? [OPEN-ENDED]

EFFICIENT MOTORS

[Ask if Q62 = 5]

106. How many efficient motors did you install? [OPEN-ENDED]

[Ask if Q62 = 5]

107. What is the approximate average horsepower of the new motors? That is, what is the average across all of the motors you installed without an incentive? [OPEN-ENDED]

[Ask if Q62 = 5]

108. What is the approximate average efficiency of the new motors? That is, what is the average efficiency across all of the new motors? [OPEN-ENDED]

[Ask if Q62 = 5]

109. On average, how many hours per day do the motors operate? That is, what the average number of hours the motors you installed operate? [OPEN-ENDED]

[Ask if Q62 = 5]

110. How important was your experience with the program in your decision to install efficient motors?
[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask if Q62 = 5]

111. If you had NOT participated in the program, how likely is it that your organization would still have installed the efficient motors?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask if [Q110=0,1,2,3 AND Q111=0,1,2,3] OR [Q110=8,9,10 AND Q111=8,9,10]]

112. You scored the importance of your program experience to your decision to implement efficient motors with [Q110 RESPONSE] out of 10 possible points. You ALSO scored the likelihood of implementing the efficient motors if your organization had not participated in the program with [Q111 RESPONSE] out of 10 possible points. Can you please explain the role the program made in your decision to implement this measure? [OPEN-ENDED]

COMMERCIAL REFRIGERATION EQUIPMENT

[Ask Q113 if Q62 = 6]

113. What types of energy efficient refrigeration equipment did you install?

1. ENERGY STAR Commercial freezer
 2. ENERGY STAR Commercial refrigerator
 3. Anti-sweat heater controls
 4. LED refrigerated case lighting
 5. Refrigerated case covers
96. Some other type of refrigeration equipment
98. Not sure

[Ask if Q113 = 96]

114. What other type of energy efficient refrigeration equipment did you install? [OPEN-ENDED]

[Ask if Q113 = 1]

115. How many ENERGY STAR commercial freezers did you install? [OPEN-ENDED]

[Ask if Q113= 1, REPEAT FOR EACH UP TO THREE TIMES]

116. What is the volume in cubic feet of the first freezer? [OPEN-ENDED]

[Ask if Q113 = 1, REPEAT FOR EACH UP TO THREE TIMES]

117. Does this freezer have a solid door or a glass door?

1. Solid door
 2. Glass door
98. Not sure

[Ask Q118 if Q113 = 1, REPEAT FOR EACH UP TO THREE TIMES]

118. Is this a vertical freezer or a chest type freezer?

1. Vertical
 2. Chest
98. Not sure

[Ask Q119 if Q113 = 2]

119. How many ENERGY STAR commercial refrigerators did you install? [OPEN-ENDED]

[Ask Q120 if Q113 = 2, REPEAT FOR EACH UP TO THREE TIMES]

120. What is the volume in cubic feet of the first refrigerator? [OPEN-ENDED]

[Ask Q121 if Q113 = 2, REPEAT FOR EACH UP TO THREE TIMES]

121. Does this refrigerator have a solid door or a glass door?

1. Solid door

2. Glass door

98. Not sure

[Ask Q122 if Q113 = 2, REPEAT FOR EACH UP TO THREE TIMES]

122. Is this a vertical refrigerator or a chest type refrigerator?

1. Vertical

2. Chest

98. Not sure

[Ask Q123 if Q113 = 3]

123. Did you install humidity-based controls or conductivity-based controls, or both types?

1. Humidity-based controls

2. Conductivity-based controls

3. Both types

98. Not sure

[Ask Q124 if Q123 = 1 OR 3]

124. How many humidity-based controls did you install? [OPEN-ENDED]

[Ask Q124 if Q123 = 1 OR 3]

125. What is the total number of freezer or refrigerator doors controlled by the humidity-based controls? [OPEN-ENDED]

[Ask Q126 if Q123= 2 OR 3]

126. How many conductivity-based controls did you install? [OPEN-ENDED]

[Ask Q127 if Q123 = 2 OR 3]

127. What is the total number of freezer or refrigerator doors controlled by the conductivity-based controls? [OPEN-ENDED]

[Ask Q128 if Q123 = 98]

128. How many anti-sweat heater controls did you install? [OPEN-ENDED]

[Ask Q129 IF Q123 = 98]

129. What is the total number of freezer or refrigerator doors controlled by the anti-sweat heater controls? [OPEN-ENDED]

[Ask Q130 IF Q113 = 4]

130. How many linear feet in total of LED case lighting did you install? [OPEN-ENDED]

[Ask Q131 IF Q113 = 5]

131. How many linear feet of refrigerated case covers did you install? [OPEN-ENDED]

[Ask Q132 if Q62 =6]

132. How important was your experience with the program in your decision to install the energy efficient refrigeration equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask Q133 if Q62 =6]

133. If you had NOT participated in the program, how likely is it that your organization would still have installed this energy efficient refrigeration equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask Q134 if [Q132=0,1,2,3 AND Q133=0,1,2,3] AND [Q132=8,9,10 AND Q133=8,9,10]]

134. You scored the importance of your program experience to your decision to implement energy efficient refrigeration equipment with [Q132 RESPONSE] out of 10 possible points. You ALSO scored the likelihood of implementing energy efficient refrigeration equipment if your organization had not participated in the program with [Q133 RESPONSE] out of 10 possible points. Can you please explain the role the program made in your decision to implement this measure? [OPEN-ENDED]

COMMERCIAL KITCHEN EQUIPMENT

[Ask Q135 if Q62 = 7]

135. What type of kitchen equipment did you install?

1. Low flow pre-rinse spray valves
2. ENERGY STAR Commercial fryers
3. ENERGY STAR Commercial steam cookers
4. ENERGY STAR hot food holding cabinets
5. ENERGY STAR commercial griddles
6. ENERGY STAR commercial convection ovens
7. ENERGY STAR commercial combination ovens
96. Some other type of kitchen equipment
98. Not sure

[Ask Q136 if Q135 = 96]

136. What other type of kitchen equipment did you install? [OPEN-ENDED]

[Ask Q137 if Q135 = 1]

137. Is the flow rate for any of the spray valves you installed equal to or less than 1.6 gallons per minute?

1. Yes
2. No
98. Not sure

[Ask Q138 if Q135 = 1]

138. How many pre-rinse spray valves with a flow rate equal to or less than 1.6 gallons per minute did you install? [OPEN-ENDED]

[Ask Q139 if Q135 = 1]

139. Did you install the pre-rinse spray valves that the [LOCATION] location?

1. Yes

2. No

98. Not sure

[Ask Q140 if Q139= 2]

140. In what city is the building where you installed the pre-rinse spray valves located in? [OPEN-ENDED]

[Ask Q141 if Q135 = 2]

141. How many ENERGY STAR commercial fryers did you install? [OPEN-ENDED]

[Ask Q142 if Q135 = 3]

142. How many ENERGY STAR commercial steam cookers did you install?

1. Number of 3 pan steam cookers [OPEN-ENDED, NUMERIC]

2. Number of 4 pan steam cookers [OPEN-ENDED, NUMERIC]

3. Number of 5 pan steam cookers [OPEN-ENDED, NUMERIC]

4. Number of 6 pan steam cookers [OPEN-ENDED, NUMERIC]

98. Not sure

[Ask Q143 if Q135 = 4]

143. How many ENERGY STAR hot food holding cabinets did you install? [OPEN-ENDED]

[Ask Q144 if Q135 = 5]

144. How many ENERGY STAR commercial griddles did you install? [OPEN-ENDED]

[Ask Q145 if Q135 = 6]

145. How many ENERGY STAR commercial convection ovens did you install? [OPEN-ENDED]

[Ask Q146 IF Q135 = 7]

146. How many ENERGY STAR commercial combination ovens did you install? [OPEN-ENDED]

[Ask Q147 if Q62= 1 and Q135=1-8]

147. How important was your experience with the program in your decision to install this kitchen equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask Q148 if Q62= 1 and Q135=1-8]

148. If you had NOT participated in the program, how likely is it that your organization would still have installed this kitchen equipment?

[SCALE 0 "Not at all important" - 10 "Very important", 98=Not sure]

[Ask Q134 if [Q147 =0,1,2,3 AND Q148=0,1,2,3] OR [Q147 =8,9,10 AND Q148 = 8,9,10]]

149. You scored the importance of your program experience to your decision to implement energy efficient kitchen equipment with [Q147 RESPONSE] out of 10 possible points. You ALSO scored the likelihood of implementing energy efficient kitchen equipment if your organization had not participated in the program with [Q148 RESPONSE] out of 10 possible points. [OPEN-ENDED]

150. Can you please explain the role the program made in your decision to implement this measure? [OPEN-ENDED]

151. Do you any suggestions for improving the program? [OPEN-ENDED]

FIRMOGRAPHICS

152. Which best describes your facility located at [LOCATION]? Would you say that this facility is...

1. Your company's only location
2. One of several locations owned by your company
3. The headquarters location of a company with several locations
98. Not sure

99. Prefer not to state

153. Does your company rent or own and occupy, or own and rent the facility to someone else at this location?

1. Rent
2. Own and occupy
3. Own and rent to someone else

98. Not sure

99. Prefer not to state

154. How would you describe the building type for the [LOCATION] facility?

1. College / University
2. Grocery or Convenience Store
3. Hotel / Motel
4. Industrial / Manufacturing
5. K-12 School
6. Medical / Healthcare
7. Office
8. Religious Worship
9. Restaurant
10. Retail
11. Warehouse

98. Not sure

99. Prefer not to state

155. How long have you been in business at this location?

1. Less than 1 year
2. 1 – 2 years
3. More than 2 years to 5 years
4. More than 5 years to 10 years

5. More than 10 years

98. Not sure

99. Prefer not to state

156. Do you have any other comments that you would like to relay to [UTILITY] about energy efficiency in the commercial and industrial sector or about their programs? [OPEN-ENDED]

157. To help improve the program, would you be open to being contacted by [UTILITY] if there are any follow-up questions about your comments in this survey?

a) Yes, I'm open to being contacted

b) No, I prefer not to be contacted

[Display if Q159= Yes]

158. If yes:

a) Please provide your preferred contact information (e.g., phone number or email):

[OPEN-ENDED]

159. Thank you for taking the time today to complete this survey. As stated previously, we will be sending you a \$10 electronic gift card as a thank you for your responses. The email address we have on file for you is [Email], is this information correct?

1. Yes, please send my electronic gift card to the above email address

2. No, please send my electronic gift card to the following email address [OPEN-ENDED]

3. No, I do not wish to receive a gift card

[end of survey]

A.2 CEEP CEI Participant Survey

Introduction [Do not display title]

1. Thank you for meeting with me to talk about OG&E's Continuous Energy Improvement Program today.

I would like to record our discussion so that I have something I can refer to when drafting my notes from the interview. Is it all right if I record this discussion?

2. To begin with, can you me about your business and your role at your business?

Awareness

3. How long have you been participating in the CEI Program?

4. Do you recall how your company first became involved with OG&E's CEI program?

a) Were you approached by program representatives, contractors, or another source?

b) [If unclear] Had you participated in other programs offered by OG&E or other utilities before (or at the same time as) adopting the CEI behavioral program?

5. How was the CEI program described to you?

a) Did you have any questions? Were they answered?

Motivation and Program Influence

6. What benefits was your company hoping to achieve by participating in the CEI program?

Optional probe: "For example, were you looking for cost savings, improved energy efficiency, employee engagement, or other benefits?"

a) What were the most important factors leading to your company's decision to participate in OG&E's CEI option?

7. Before participating in the CEI program, did you have a role focused on reducing energy use or improving sustainability? If yes, what was that role? Did others in your company have that role?

Project Decision Making

8. In the past year, did your company implement any energy-saving measures identified through the CEI program or its facility assessment?

a) If yes, what measures did you implement?

b) What factors influenced your decision to implement those measures?

9. How did the CEI program contribute to identifying or implementing these projects, if at all?

a) What program activities or support were most helpful?

b) Were there any activities or support that were not helpful?

10. Before working with the CEI program, had your organization already identified any energy-saving projects?

a) Which projects had you identified?

b) Did CEI support change how you approached these projects or their scope?

c) Did participating in CEI change the timing of these projects? If yes, would they have been delayed a year or more without CEI?

11. Without CEI support, how likely is it that you would have identified and implemented the same energy-saving opportunities?

12. Aside from CEI assistance, did you receive an incentive from OG&E for any energy-saving project completed in 2025? If yes, what was the project?

Barriers

13. Are there any energy-saving actions identified through the CEI program that your company has not yet implemented?

If yes: What are those actions?

14. What barriers, if any, are preventing or delaying you from implementing those actions?

Probes:

Financial constraints

Lack of internal buy-in

Technical challenges

Time or staffing limitations

Disruption to operations

15. What could OG&E do to help remove or minimize these barriers so you can take those actions?
16. From your perspective, why might companies like yours be reluctant to participate in a program like CEI?
17. What could OG&E do to encourage more companies to participate in the CEI program?

Program Experience and Perceptions

18. How did the CEI program compare to your expectations?
Probes: Was the process what you expected? Were the outcomes what you expected? What was different than you expected?
19. Have you experienced the benefits you hoped to get from participating?
If not: How has the program fallen short?
20. Have there been any drawbacks or complications related to your participation in the CEI program?
21. What, if anything, could OG&E do to make this program more useful for your business?

Probes:

Length or clarity of recommendations

Prioritization based on cost, savings, or disruption

Support for internal buy-in

Cost/time required to implement measures

Program Satisfaction

22. Were there parts of the CEI process that went or are going particularly well? Any that could be improved? How?
23. From your perspective, what is the biggest thing OG&E could do to improve customer satisfaction with the CEI program as an energy saving option?

Conclusion

24. Do you have anything else you would like to tell OG&E about your experience with the CEI program?

25. To help improve the program, would you be open to being contacted by OG&E if there are any follow-up questions about your comments in this survey?

1. Yes, I'm open to being contacted
2. No, I prefer not to be contacted

[Display if Q25 = 1]

26. Please provide your preferred contact information (e.g., phone number or email):

A.4 CEEP Trade Ally Interview Guide

Introduction

1. How would you characterize the types of services your business provides?

Please select all that apply. [MULTI-SELECT]

1. Contractor – Lighting/Electrical
2. Contractor – HVAC
3. Contractor – Mechanical
4. Distributor – Lighting/Electrical
5. Distributor – HVAC
6. Distributor - Mechanical
7. Contractor - Refrigeration
8. Vendor/Retailer
9. Engineer
10. Manufacturer
11. Energy Service Company/ Energy Consultant
96. Other (Please specify): [OPEN-ENDED]
98. Don't know [MAKE ANSWER EXCLUSIVE]

2. What is your position or title at your company? [OPEN-ENDED]

3. Approximately how many full-time and part-time employees work for your organization most of the year? Please consider the whole company, even employees working in other states or regions. Your best estimate is fine- we are just looking to understand the size of companies involved in OG&E's Commercial and Industrial Programs.

1. 10 or fewer

2. 11 to 49

3. 50 to 99

4. 100 to 249

5. 250 to 499

6. 500 or more

98. Don't know

4. What role does your firm typically take in the incentive application process?

1. Full responsibility - Handling all aspects for all incentive application process.

2. Limited role - Providing necessary information, customers handle incentive application process.

3. Role varies, dependent on project– Handling full application process for some projects, providing support for others as needed.

4. No role – Customers handle incentive application process, no support provided.

96. Other role (Please specify): [OPEN-ENDED]

5. Does your business receive rebate payments or are they directed to customers? Please select the option that best describes your company's typical process.

1. We receive rebate payments from OG&E, customers receive an instant discount

2. Customers receive rebate payments from OG&E

96. Other (Please specify): [OPEN-ENDED]

98. Don't know

6. In 2025 did your organization inform eligible customers about OG&E's incentives for high efficiency equipment?

1. Yes

2. No

[DISPLAY IF Q6=1]

7. Which of the following methods did you use to inform your customers about OG&E's Commercial and Industrial Programs in 2025? Please select all that apply. [MULTI-SELECT]

- 1. Word of mouth during sales visits
- 2. Project proposals with rebate included as line item
- 3. On your company website
- 4. Send materials via US Mail
- 5. Send information in marketing emails
- 96. Other methods (Please specify): [OPEN-ENDED]

8. From your experience, why do some customers choose standard-efficiency equipment instead of high-efficiency models? [MULTI-SELECT]

- 1. Up-front purchase price is too high, even after the rebate
- 2. Installation or commissioning costs are higher
- 3. Payback period (return on investment) feels too long
- 4. Customers are not convinced the energy savings will be real
- 5. High-efficiency models are hard to find or have long lead times
- 6. Customer is unaware of the available rebate/incentive
- 7. Customer wants the quickest "like-for-like" replacement to limit downtime
- 8. Space, plumbing, or electrical constraints make installation difficult
- 96. Other reason (please describe): [OPEN-END]
- 97. None of these barriers apply
- 98. Not sure / don't know [EXCLUSIVE]

[DISPLAY IF Q8<>97/98, Q8 [COUNT]>1]

9. Which of those reasons is typically the most important?

[CARRY FORWARD SELECTED CHOICES FROM Q8]

10. Thinking about the projects that you completed as part of this program in 2025, did the program influence the type, quantity, or efficiency level of the items that you recommended to customers? In other words, would you have made different recommendations if the program were not available?

1. Yes
2. No
98. Don't know

[DISPLAY IF Q10=1]

11. Please briefly describe the most significant ways in which this program influenced your decision to recommend energy efficient items to customers during 2025. Please select all that apply. [Multiselect]

1. Program rebate made higher-efficiency models affordable for my customers
2. I recommended a higher efficiency level (e.g., premium tier) than I normally would
3. I recommended a larger quantity of efficient items (more fixtures, units, etc.)
4. I suggested adding advanced controls or add-ons (e.g., sensors, VFDs) that I would not normally propose
5. I switched to a different technology altogether because it qualified (e.g., LED instead of fluorescent, heat-pump instead of gas unit)
6. I encouraged customers to replace equipment sooner than they had planned
7. I bundled multiple efficiency measures into one project to maximize the incentive
8. Program training or technical guidance increased my confidence to recommend efficient options
9. I prioritized brands/models specifically listed by the program
10. I offered to handle the rebate paperwork, which helped customers accept my recommendation
11. Other influence (please describe):
12. Not sure / can't recall [MAKE ANSWER EXCLUSIVE]

12. When your customers install high-efficiency equipment but do not apply for an OG&E incentive, what reasons do they give? Please select all that apply. [MULTI-SELECT]

1. Customer did not know a rebate was available
2. Learned about the rebate after the application deadline
3. Paperwork or approval process felt like too much hassle
4. Incentive amount was too small to be worth the effort
5. Rebate payment would take too long to receive

- 6. Customer could pay for the project without assistance
- 7. Customer preferred not to share business or project data with OG\&E
- 8. Contractor did not offer to handle the rebate paperwork
- 9. Equipment or project did not meet program rules (model size, specs, etc.)
- 10. Qualifying equipment was hard to find or had long lead times
- 12. None of these barriers apply [MAKE ANSWER EXCLUSIVE]
- 96. Other reason (please explain): [OPEN-ENDED]
- 98. Not sure / don't know [MAKE ANSWER EXCLUSIVE]
- 99. Not applicable – all eligible customers you work with apply for rebates [MAKE ANSWER EXCLUSIVE]

[DISPLAY IF Q12 <>98/99, Q12 [COUNT]>1]

- 13. Which of those reasons is typically the most important?

[CARRY FORWARD SELECTED CHOICES FROM Q12]

P&C Perceptions

- 14. How effective are current program incentives levels at motivating your customers to buy high efficiency equipment instead of standard efficiency equipment? Please answer on a scale from 1, meaning “not at all effective,” to 5, meaning “very effective.”

1. 1 - Not at all effective

2. 2

3. 3

4. 4

5. 5 – Very effective

98. Don't know

- 15. Are there any specific measures for which the current incentive levels do not motivate customers to buy high efficiency equipment instead of standard efficiency equipment? If so, what are they and how much would incentives need to be increased to get good uptake? [OPEN-ENDED]

- 16. Are there additional measures that currently do not receive incentives but should? If so, what are they? [OPEN-ENDED]

Application Process

17. How, if at all, could OG&E improve the processes or application tools for OG&E's energy efficiency programs? [OPEN-ENDED]

SBS Perceptions [Display if provides services to SBS program, SBS=1]

18. How effective are program discounts at motivating your small business customers to buy high efficiency equipment instead of standard efficiency equipment? Please answer on a scale from 1, meaning "not at all effective," to 5, meaning "very effective."

1. 1 - Not at all effective

2. 2

3. 3

4. 4

5. 5 – Very effective

98. Don't know

19. Are there any specific measures for which the current discounts do not motivate small business customers to buy high efficiency equipment instead of standard efficiency equipment? If so, what are they? [OPEN-ENDED]

20. Are there additional measures for small business customers that currently do not receive discounts but should? If so, what are they? [OPEN-ENDED]

Program Staff

21. In 2025 did you have any interactions with program staff?

1. Yes

2. No

98. Don't know

[DISPLAY IF Q21=1]

22. Please rate your level of satisfaction with each of the following, using a scale where 1 is "extremely dissatisfied" and 5 is "extremely satisfied."

[Scale: 1=Extremely dissatisfied – 5=Extremely satisfied, 98=Don't know, 99=Not applicable]

1. Staff ability to explain program rules and customer eligibility
2. Staff's knowledge about energy efficiency and energy efficient products
3. Staff response time to answer questions
4. Staff level of professionalism and courteousness

[DISPLAY IF Q22<3]

23. In what ways, if any, could your interactions with staff have been improved? [OPEN-ENDED]

24. How, if at all, could OG&E improve the processes or application tools for equipment discounts for small businesses? [OPEN-ENDED]

Program Satisfaction

25. How important are the OG&E's energy efficiency programs to your business' financial success? Please use a scale from 1 (not at all important) to 5 (very important).

1. 1 – Not at all important
2. 2
3. 3
4. 4
5. 5 – Very important
98. Don't know

26. If you could change one thing about the program that would help you complete more projects, what would it be? [OPEN-ENDED]

27. Please rate your satisfaction with the following aspects of the program using a scale where 1 is "extremely dissatisfied" and 5 is "extremely satisfied."

[Scale: 1=Extremely dissatisfied – 5=Extremely satisfied, 98=Don't know, 99=Not applicable]

1. The amount of time it takes to receive the rebate or incentive (from the time you turned in final paperwork to OG&E)
2. The range of equipment that qualifies for rebates or incentives

3. The website application center

4. The program overall

[DISPLAY IF Q27=1 [COUNT]>0 OR Q27=2 [COUNT]>0]

28. Please describe what was less than satisfactory about the program. [OPEN-ENDED]

29. Is there anything else you would like to tell us about your experience with this program? [OPEN-ENDED]

A.5 CEEP Midstream Participant Survey

Introduction and Screening

1. According to our records, your business bought some [EQUIPMENT_TYPE] in [YEAR] that was discounted through OG&E's [PATHWAY_NAME] program. Are you familiar with the purchase of this equipment?

1. Yes

2. No

[Display Q2 IF Q1 = 1]

2. Did you make the decision to purchase the [EQUIPMENT_TYPE] or were you involved in the decision?

1. Yes

2. No [Terminate]

98. Not sure [Terminate]

Verification

3. Did you install the [Equipment Type] at the business located at [Location]?

1. Yes

2. No

98. Not sure

[Display if Q3 = 2]

4. Was the equipment installed somewhere else or is it not currently installed

1. Installed somewhere else

2. Has not been installed

3. Not sure

5. Prior to this survey, were you aware that the [EQUIPMENT_TYPE] your organization purchased was discounted from its normal selling price?

1. Yes

2. No

[Display if Q5 = 1]

6. Were you also aware that OG&E provided the discount?

1. Yes

2. No

7. How did you first learn about the discounts provided on the equipment you purchased?

[Randomize 1 – 4]

1. From an employee at the distributor or retailer you purchased the equipment from

2. From marketing materials displayed at the store

3. Prior experience with the program or participating distributor

4. From a contractor who installed the equipment

96. Through some other means (Please describe). [OPEN-ENDED]

98. I do not recall

8. Who made the purchase of the [EQUIPMENT_TYPE] from the retailer or distributor? Please select all that apply.

[Multiselect]

1. Yourself

2. Another person from your organization

3. A contractor you worked with

96. Someone else (Please explain). [OPEN-ENDED]

98. Not sure [MAKE ANSWER EXCLUSIVE]

Free-Ridership

[Display Section if Q5 = 1]

9. Prior to the purchase of the energy efficient [EQUIPMENT_TYPE] in [YEAR], had your company installed similar energy efficient [EQUIPMENT_TYPE]?

1. Yes

2. No, not that you are aware of

[Display Q10 IF Q9 = 1]

10. Did your organization install any of that [EQUIPMENT_TYPE] without receiving a discount or rebate from OG&E?

1. Yes

2. No, we received an OG&E discount or rebate for some or all the purchases

98. Not sure

11. The next questions are about the [EQUIPMENT_TYPE] you purchased in [YEAR] that received an OG&E discount.

Did your organization learn about the [EQUIPMENT_TYPE] discounts available before you made the decision to purchase the energy efficient [EQUIPMENT_TYPE], at the time you made the purchase, or after the purchase had been made?

- 1. Before
- 2. At the time of the purchase
- 3. After the purchase
- 98. Not sure

[Display if Q11 = 1 or 2]

12. Do you think your organization would still have purchased the energy efficient [EQUIPMENT_TYPE] if the discounts were not available?

- 1. Yes
- 2. No
- 98. Not sure

13. Could your organization have afforded the energy efficient [EQUIPMENT_TYPE] without the OG&E discount?

- 1. Yes
- 2. No

14. How important were each of the following factors in your decision to purchase the [EQUIPMENT_TYPE]?

[Use a scale of 0 (Not at all important) – 10 (Very important), 99 = Not applicable]

- a) A recommendation from the distributor
- b) The availability of the discount
- c) Promotional or marketing materials you viewed
- d) Information provided by an OG&E representative
- e) A recommendation from a contractor you worked with

15. How likely is it that you would have purchased the energy efficient [EQUIPMENT_TYPE] if the OG&E discounts were not available?

1. Definitely would not have
2. Probably would not have
3. Probably would have
4. Definitely would have

16. Without the discounts from OG&E, do you think you would have installed the exact same energy efficient [EQUIPMENT_TYPE], or would you have done something different?

1. Installed the same equipment
2. Done something different
98. Don't know

[Display if Q16 = 2]

17. What do you think you would have done if the OG&E discounts were not available? Please select more than one if applicable.

[Multiselect, with 3 and 98 exclusive]

1. Completed a smaller project with the same types of [EQUIPMENT_TYPE]
2. Installed different energy efficient [EQUIPMENT_TYPE]
3. Not installed any energy efficient [EQUIPMENT_TYPE]
98. Not sure

[Display if Q17 = 2]

18. Did you purchase the energy efficient [EQUIPMENT_TYPE] sooner than you otherwise would have if the discounts from OG&E were not available?

1. Yes
2. No
98. Not sure

[Display if Q18 = 1]

19. When would you have purchased [EQUIPMENT_TYPE] if the discounts from OG&E were not available?

1. 0 to 6 months later
2. 7 months to 1 year later
3. More than 1 year up to 2 years later
4. More than 2 years up to 3 years later

5. More than 3 years up to 5 years later

6. Over 5 years later

7. Never

98. Not sure

Spillover

20. Since you bought the discounted [EQUIPMENT_TYPE], have you bought any additional [EQUIPMENT_TYPE] that you did not get a discount or OG&E rebate for?

1. Yes

2. No

[Display if Q20 = 1]

21. Please describe the additional [EQUIPMENT_TYPE] that you bought without getting a discount or rebate. Please include the amount of equipment you bought in your description.

[Display if Q20 = 1]

22. How important was your experience with the OG&E discounts in your decision to buy that additional equipment?

[0 Not at all important – 10 Extremely important]

[Display if Q20 = 1]

23. How likely is it that you would have bought the additional [EQUIPMENT_TYPE] if you had not had experience with the OG&E discounts?

[0 Not at all likely – 10 Extremely likely]

Program Feedback

24. Were you aware that OG&E offers rebates for energy efficient equipment that you can receive if you purchase it at full price and then submit a rebate application?

1. Yes

2. No

[Display if Q24 = 1]

25. Has your organization received any OG&E incentives by applying for a rebate on equipment it purchased?

1. Yes

2. No

[Display if Q24 = 1]

26. Thinking about the [EQUIPMENT_TYPE] you received a discount for in [YEAR], why did your organization purchase the discounted [EQUIPMENT_TYPE] instead of purchasing it at full price and then applying for it? Please select all that apply.

[Multiselect]

1. The project was too small to complete an application for
2. The discounts are easier/less work
3. You didn't know if rebates were available for the equipment you got a discount on
4. A contractor recommended purchasing the discounted equipment
96. For some other reason (Please explain). [OPEN-ENDED]
98. Not sure [MAKE ANSWER EXCLUSIVE]

27. Overall, how well did the [EQUIPMENT_TYPE] that you got a discount for meet your expectations for performance?

[Scale: 1 Not at all well - 5 Very well, 98= Not sure]

[Display if Q27 = 1 or 2]

28. In what ways has the [EQUIPMENT_TYPE] not performed as well as you expected? [OPEN-ENDED]

[Display if Q27 = 1 or 2]

29. Do you have any suggestions for how OG&E can improve its [EQUIPMENT_TYPE] program? [OPEN-ENDED]

[Display if Q26 = 4]

30. Overall, how would you rate your experience with the contractor that recommended purchasing your discounted equipment?

[Scale: 1 Not very satisfactory - 5 Very satisfactory, 98= Not sure, 99=Not applicable]

[Display if Q30 = 1 or 2]

31. In what ways was your experience with the contractor not as satisfactory as you expected? [OPEN-ENDED]

Firmographics

32. Which best describes your facility located at [Location]?

- 1. Your company's only location
- 2. One of several locations owned by your company
- 3. The headquarters location of a company with several locations
- 98. I don't know
- 99. Prefer not to state

33. Does your company rent or own and occupy, or own and rent the facility to someone else at this location?

- 1. Rent
- 2. Own and occupy
- 3. Own and rent to someone else
- 98. I don't know
- 99. Prefer not to state

34. How would you describe the building type for the [Location] facility?

- 1. College / University
- 2. Grocery or Convenience Store
- 3. Hotel / Motel
- 4. Industrial / Manufacturing
- 5. K-12 School
- 6. Medical / Healthcare
- 7. Office
- 8. Religious Worship
- 9. Restaurant
- 10. Retail
- 11. Warehouse
- 98. I don't know
- 99. Prefer not to state

35. How long have you been in business at this location?

1. Less than 1 year
2. 1 – 2 years
3. More than 2 years to 5 years
4. More than 5 years to 10 years
5. More than 10 years
98. Not sure
99. Prefer not to state

Conclusion

36. Do you have any other comments that you would like to relay to OG&E about energy efficiency in the commercial and industrial sector or about their programs? [OPEN-ENDED]

37. To help improve the program, would you be open to being contacted by OG&E if there are any follow-up questions about your comments in this survey?

1. Yes, I'm open to being contacted
2. No, I prefer not to be contacted

[DISPLAY IF Q37=1]

38. Please provide your preferred contact information (e.g., phone number or email):
[OPEN-ENDED]

39. Thank you for taking the time today to complete this survey. As stated previously, we will be sending you a \$10 electronic gift card as a thank you for your time spent completing the survey. The email address we have on file for you is [EMAIL], is this information correct?

1. Yes, please send my electronic gift card to the above email address
2. No, please send my electronic gift card to the following email address [OPEN-ENDED]
3. No, I do not wish to receive a gift card

A.5 HEEP PEH New Homes Builders Survey

Role and Position in Company

1. What is your job title or position at [COMPANY]?

1. Owner / Principal / Partner
2. President / Chief Executive Officer
3. Vice-President / Director of Construction
4. Division or Regional Manager
5. Construction Manager / General Superintendent
6. Project Manager / Site Superintendent
7. Purchasing / Procurement Manager
8. Design Manager / Architect
9. Sales or Marketing Manager
10. Energy-Efficiency / Sustainability Manager (or Coordinator)
11. Estimator / Cost Analyst
12. Administrative / Office Manager
96. Other (please specify) [OPEN-ENDED]
98. Prefer not to say

2. What do you personally do for the OG&E Positive Energy New Homes program? [MULTI-SELECT]

1. Select or specify the energy-efficient equipment / home specs
2. Complete and submit program paperwork or online forms
3. Coordinate with the HERS rater / energy consultant
4. Supervise construction to be sure program standards are met
5. Schedule or oversee program inspections or testing
6. Market or explain the program to buyers or real-estate agents
7. Apply for or manage the program incentives / rebates
96. Other (please specify) [OPEN-ENDED]
97. None of these [EXCLUSIVE]

Program Participation Experience

3. Did your company build any new homes in 2025 in the OG&E Arkansas service area that did not receive Positive Energy New Homes Construction incentives?

1. Yes: About how many? [OPEN-ENDED, NUMERIC]

2. No

98. Don't know

99. Prefer not to say

[DISPLAY IF Q3 = 1 OR 2]

4. Of the homes you built that didn't receive Positive Energy New Homes Construction incentives, how many were still built to program standards?

1. All of them

2. Some of them: About how many? [OPEN-ENDED, NUMERIC]

3. None of them

98. Don't know

[DISPLAY IF Q4 = 1 OR 2]

5. Why didn't you apply for Positive Energy New Homes incentives for those qualifying homes? Please select all that apply.

[MULTISELECT]

1. Incentive amount was too small to justify the time / paperwork

2. Paperwork or documentation requirements were too burdensome

3. Missed an application deadline or program step

4. HERS rater or program inspection could not be scheduled in time

5. Buyer did not want to wait for the incentive process

6. Didn't realize the home was eligible

8. Program funding was on hold or not available at the time

9. Was not aware of the program at the time

96. Other (please specify) [OPEN-ENDED]

98. Don't know / Not sure [EXCLUSIVE]

Customer Program Awareness and Marketing

6. When do most of your buyers sign a contract for the home?

1. Before construction begins (custom / pre-sold)
2. After the home is completed (spec)
3. We do about a mix of both
98. Don't know / Not sure

[Display if Q6 = 1 or 3]

7. In the past year, about what share of your buyers asked for energy-efficient features or an energy-efficient home?

1. 0 % (none)
2. 1–10 %
3. 11–25 %
4. 26–50 %
5. More than 50 %
98. Don't know / Not sure

[Display if Q6 = 1 or 3]

8. In the past year, among the homes you sold that qualified for OG&E incentives, about what share of buyers had already decided they wanted an energy-efficient home before working with you?

1. 0 % (none)
2. 1–10 %
3. 11–25 %
4. 26–50 %
5. More than 50 %
98. Don't know / Not sure

9. Do you actively promote the OG&E Positive Energy New Homes certification as a selling point when marketing your homes to buyers or prospects?

1 Yes

2 No

98 Don't know / Not sure

[Display if Q9 = 1]

10. In which of the following ways do you highlight the Positive Energy certification?

Select all that apply. [MULTI-SELECT]

1. Printed brochure or flyer describing the certification

2. Yard sign or model-home signage with the certification logo

3. Certification badge or text on our company website

4. Certification mentioned in MLS / real-estate listings

5. Social-media posts (e.g., Facebook, Instagram) featuring the certification

6. Verbal sales pitch to buyers (no written materials)

7. Certification logo on purchase contracts or closing documents

96. Other (please specify) [OPEN-ENDED]

97. None of these [MAKE ANSWER EXCLUSIVE]

98. Don't know / Not sure [MAKE ANSWER EXCLUSIVE]

11. Compared with other considerations, how important are a home's energy costs in your buyers' decisions to purchase a home?

1. Not important

2. Slightly important

3. Moderately important

4. Very important

5. Extremely important

98. Don't know / Not sure

Trends

12. Over the next 12 months, do you expect any factors to change how many homes you build to OG&E Positive Energy standards?

1. Yes

2. No

98. Not sure

[Display if Q12 = 1]

13. What trends, if any, do you see in the next 12 months that might affect the number of new homes built to Positive Energy standards? [MULTI-SELECT]

1. Higher interest rates reducing buyer demand

2. General economic slowdown or recession concerns

3. Rising material or equipment costs

4. Shortages or higher cost of construction labor

5. Supply-chain delays for energy-efficient equipment or materials

6. Stricter (or changing) state/local energy codes

7. Changes to OG&E incentive amounts or program requirements

8. Uncertainty about future OG&E program funding

9. Increased consumer demand for energy-efficient homes

10. Competing utility or tax-credit programs drawing buyers elsewhere

96. Other (please specify) [OPEN-ENDED]

98. Don't know / Not sure [EXCLUSIVE]

Building Energy Efficient Homes

14. We now have a few questions about why you build energy-efficient homes.

Please tell us how important each item was in your decision to meet the program's building standards in 2025.

Use a scale from 1 ("not at all important") to 5 ("very important").

[INSERT 1-5 SCALE AS DEFINED ABOVE, WITH 98= DON'T KNOW]

1. The ability to differentiate yourself in the market

2. The program financial incentive
3. Customer demand for energy efficient homes
4. Other assistance program

15. To what degree, if at all, is having the independent HERS rating an advantage in selling your homes? Please answer on a scale from 1, meaning “no advantage at all,” to 5, meaning “a great advantage.”

[INSERT 1-5 SCALE AS DEFINED ABOVE, WITH 98= DON'T KNOW]

Free-Ridership

16. How influential were each of the following Positive Energy Home program features in your decision to build qualifying homes in 2025?

Please use a 1–5 scale, where 1 = Not at all influential and 5 = Extremely influential.

[INSERT 1-5 SCALE AS DEFINED ABOVE, WITH 98= DON'T KNOW AND 99=NOT APPLICABLE]

1. The rebates provided by the program
2. Any technical assistance you received, including from CLEAResult's internal HERS raters
3. Program informational documents or marketing materials

17. If the OG&E Positive Energy New Homes program did not exist, how likely is it that you would still have built any homes in OG&E's territory that meet the program's efficiency standards?

Please use a 1–5 scale, where 1 = Not at all likely and 5 = Very likely.

[INSERT 1-5 SCALE AS DEFINED ABOVE, WITH 98= DON'T KNOW]

18. Now, thinking about your history of working with the program, if the program had never been available, would you have built fewer or the same number of homes in 2025 to the OG&E efficiency standards?

Please consider rebates, technical assistance, program staff support—everything the program provides.

1. The same number
2. Fewer

98. Don't know

[DISPLAY IF Q18 = 2]

19. You said you would have built fewer homes to the program's efficiency standards if the program had never existed.

About what percentage of the homes you actually built in 2025 would still have met those standards without the program?

1. 0 % (none)

2. 1–25%

4. 26–50%

5. 51–75%

6. 76–100%

98. Don't know / Not sure

20. In your own words, how has working with the program impacted the energy efficiency of the homes you received incentives for in 2025? [OPEN-ENDED]

21. Since you started working with the Positive Energy New Homes program, have you changed your standard building specifications or practices—even for homes that don't enroll in the program?

1. Yes

2. No

98. Don't Recall

99. I prefer not to say

[Display if Q21 = 1]

22. What specific construction elements have you added to your standard homes since you first joined the program? Please select all that apply.

[Multiselect]

1. Higher insulation levels

2. Better air-sealing / lower blower-door target

3. Higher-efficiency HVAC equipment
4. Duct sealing or ducts inside conditioned space
5. Low-U-factor or low-SHGC windows
6. High-efficiency water heater
7. LED lighting as standard
8. Smart / programmable thermostats
96. Other (specify) [OPEN-ENDED]
97. None of these [MAKE ANSWER EXCLUSIVE]

Spillover

23. In 2025, did your company build any homes in the OG&E Arkansas service area that met Positive Energy New Homes standards but for which you did not apply for the program incentive?

- 1 Yes
- 2 No
- 98 Not sure

[DISPLAY IF Q23 = 1]

24. Did you build any new homes in 2025 that receive electricity service from OG&E Arkansas that qualified for program incentives that you did not apply incentives?

1. Yes
2. No
98. Not sure

[DISPLAY IF Q24 = 1]

25. About how many qualifying homes in 2025 did not receive the incentive? [OPEN-ENDED]

[DISPLAY IF Q24 = 1]

26. Thinking about the 2025 homes you built to Positive Energy standards but did NOT receive the incentive, how influential was the OG&E Positive Energy Home program on your decision to build those homes?

Please use a 1–5 scale, where 1 = Not at all influential and 5 = Very influential

[INSERT 1-5 SCALE AS DEFINED ABOVE, WITH 98= DON'T KNOW]

[DISPLAY IF Q24 = 1]

27. And if you had not participated in OG&E's program, how likely is it that you would have built those homes to Positive Energy Home program standards?

Please use a 1 – 5 scale, where 1 means not at all likely and 5 means very likely.

[INSERT 1-5 SCALE AS DEFINED ABOVE, WITH 98= DON'T KNOW]

Satisfaction

28. Finally, just a few questions about your satisfaction with the program.

Have you attended any events where a program representative provided information about the program? This might include home builder association meetings, lunch-ins, or building summits.

1. Yes

2. No

98. Don't Recall

99. I prefer not to answer

[DISPLAY Q29 IF Q28 = 1]

29. How useful was the information provided?

[INSERT 1-5 SCALE, WITH 98= DON'T KNOW]

[DISPLAY Q30 IF Q29 = 1 or 2]

30. What information was not useful? [OPEN-ENDED]

31. On a scale of 1 to 5, where 1 is very dissatisfied and 5 is extremely satisfied, how would you rate your satisfaction with each of the following?

[INSERT 1-5 SCALE, WITH 98= DON'T KNOW]

1. Your interactions with program staff in general
2. The program's outreach to builders like yourself
3. The program's paperwork and record keeping processes
4. The amount of program incentives
5. How long it took to receive program incentives
6. The HERS rating process
7. OG&E's Positive Energy Homes program overall

[DISPLAY Q32 IF ANY Q31 = 1 OR 2]

32. What about the program are you dissatisfied with, if anything? [OPEN-ENDED]
33. Do you have any suggestions for streamlining or improving the participation process? [OPEN-ENDED]

Conclusion

34. To help improve the program, would you be open to being contacted by OG&E if there are any follow-up questions about your comments in this survey?
 - a) Yes, I'm open to being contacted
 - b) No, I prefer not to be contacted

[Display if Q34 = Yes]

35. Please provide your preferred contact information (e.g., phone number or email): [OPEN-ENDED]
36. Those are all the questions we have for you. Do you have anything else you want to mention regarding the program? [OPEN-ENDED]

Appendix B Cost-Effectiveness Analysis

B.1 Overview

The Evaluator estimated the cost-effectiveness for the overall energy efficiency and demand response portfolio of programs, based on PY2025 costs and savings estimates provided by OG&E and their third-party implementer, CLEAResult. This appendix provides the cost-effectiveness results, as well as a brief overview of the approach taken by the Evaluator. The portfolio and energy efficiency and demand response programs pass all the cost-effectiveness tests except the RIM test. The table below presents the cost-effectiveness results for the portfolio.

TABLE B-0-1 PY2025 COST-EFFECTIVENESS RESULTS

Program	TRC	UCT	RIM	PCT	TRC Net Benefits
Home Energy Efficiency Program	1.75	1.64	0.45	5.57	\$1,072,784
Consistent Weatherization Approach	1.35	1.40	0.48	3.65	\$1,464,253
Commercial Energy Efficiency Program	2.40	2.23	0.46	11.80	\$6,033,388
Regulatory	0.00	0.00	0.00	0.00	\$0
Planning	0.00	0.00	0.00	0.00	\$0
Total	1.86	1.85	0.46	6.45	\$8,570,424

B.2 Approach

The California Standard Practice Model was used as a guideline for the calculations, along with guidance from the AR TRM v10.0. The cost-effectiveness analysis methods that were used in this analysis are among the set of standard methods used in this industry and include the Utility Cost Test (UCT)³⁴, Total Resource Cost Test (TRC), Ratepayer Impact Measure Test (RIM), and Participant Cost Test (PCT). All tests weigh monetized benefits against costs. These monetized amounts are presented as Net Present Value (NPV) evaluated over the lifespan of the measure. The benefits and costs differ for each test based on the perspective of the test. The definitions below are taken from the California Standard Practice Manual.

The TRC measures the net costs of a demand-side management program as a resource option based on the total costs of the program, including both the participants' and the utility's costs.

The UCT measures the net costs of a demand-side management program as a resource option based on the costs incurred by the program administrator (including incentive costs) and excluding any net costs incurred by the participant. The benefits are similar to the TRC benefits. Costs are defined more narrowly.

The PCT is the measure of the quantifiable benefits and costs to the customer due to participation in a program. Since many customers do not base their decision to participate in a program entirely on quantifiable variables, this test cannot be a complete measure of the benefits and costs of a program to a customer.

³⁴ The UCT is also referred to as the Program Administrator Cost Test (PACT).

The RIM test measures what happens to customer bills or rates due to changes in utility revenues and operating costs caused by the program. Rates will go down if the change in revenues from the program is greater than the change in utility costs. Conversely, rates or bills would go up if revenues collected after program implementation are less than the total costs incurred by the utility in implementing the program. This test indicates the direction and magnitude of the expected change in customer bills or rate levels.

A common misperception is that there is a single best perspective for evaluation of cost-effectiveness. Each test is useful and accurate, but the results of each test are intended to answer a different set of questions. The questions to be addressed by each cost test are shown in the table below.³⁵

TABLE B-0-2 QUESTIONS ADDRESSED BY THE VARIOUS COST TESTS

Cost Test	Questions Addressed
Participant Cost Test (PCT)	Is it worth it to the customer to install energy efficiency?
	Is it likely that the customer wants to participate in a utility program that promotes energy efficiency?
Ratepayer Impact Measure (RIM)	What is the impact of the energy efficiency project on the utility's operating margin?
	Would the project require an increase in rates to reach the same operating margin?
Utility Cost Test (UCT)	Do total utility costs increase or decrease?
	What is the change in total customer bills required to keep the utility whole?
Total Resource Cost Test (TRC)	What is the regional benefit of the energy efficiency project (including the net costs and benefits to the utility and its customers)?
	Are all of the benefits greater than all of the costs (regardless of who pays the costs and who receives the benefits)?
	Is more or less money required by the region to pay for energy needs?

Overall, the results of all four cost-effectiveness tests provide a more comprehensive picture than the use of any one test alone. The TRC cost test addresses whether energy efficiency is cost-effective overall. The PCT, UCT, and RIM address whether the selection of measures and design of the program are balanced from the perspective of the participants, utilities, and non-participants. The scope of the benefit and cost components included in each test are summarized in Table B-0-3.³⁶

³⁵ <https://www.epa.gov/energy/understanding-cost-effectiveness-energy-efficiency-programs>

³⁶ Ibid.

TABLE B-0-3 BENEFITS AND COSTS INCLUDED IN EACH COST-EFFECTIVENESS TEST

Test	Benefits	Costs
PCT (Benefits and costs from the perspective of the customer installing the measure)	▪ Incentive payments ▪ Bill Savings ▪ Applicable tax credits or incentives	▪ Incremental equipment costs ▪ Incremental installation costs
UCT (Perspective of utility, government agency, or third party implementing the program)	▪ Energy-related costs avoided by the utility ▪ Capacity-related costs avoided by the utility, including generation, transmission, and distribution	▪ Program overhead costs ▪ Utility/program administrator incentive costs
TRC (Benefits and costs from the perspective of all utility customers in the utility service territory)	▪ Energy-related costs avoided by the utility ▪ Capacity-related costs avoided by the utility, including generation, transmission, and distribution ▪ Additional resource savings ▪ Monetized non-energy benefits as outlined by the AR TRM v10.0	▪ Program overhead costs ▪ Program installation costs ▪ Incremental measure costs
RIM (Impact of efficiency measure on non-participating ratepayers overall)	▪ Energy-related costs avoided by the utility ▪ Capacity-related costs avoided by the utility, including generation, transmission, and distribution	▪ Program overhead costs ▪ Lost revenue due to reduced energy bills ▪ Utility/program administrator installation costs

B.3 Non-Energy Benefits

In Arkansas, the IEM, in collaboration with OG&E and the other investor-owned utilities (IOU) and other stakeholders through the Parties Working Collaboratively (PWC), have developed a uniform set of benefits to be associated with measures implemented in the portfolio. These Non-Energy Benefits (NEB) are an addition to programs under the authorization of Arkansas TRM v10.0 Volume 1, Protocol L. After reviewing the guidance from the PWC, the Arkansas Public Service Commission (Commission) issued Order No. 30 on December 10, 2015, which provided direction and guidance regarding the inclusion of NEBs in the AR TRM v10.0, as follows.³⁷

“The Commission therefore orders and directs that the following three categories of NEBs be consistently and transparently accounted for in all applications of the TRC test, as it is applied to measures, programs, and portfolios:

- o benefits of electricity, natural gas, and propane energy savings (i.e., other fuels);*
- o benefits of public water and wastewater savings; and*
- o benefits of avoided and deferred equipment replacement costs as conditioned herein.”*

³⁷ See the AR TRM v10.0, Protocol L.

In response to the Commission Order for NEBs outlined above, the Evaluator complied with Protocol in the AR TRM v10.0, which encompasses NEBs:

- Protocol L1: Non-Energy Benefits for Electricity, Natural gas, and Liquid Propane (“other fuels”)
- Protocol L2: Non-Energy Benefits for Water Savings
- Protocol L3: Non-Energy Benefits of Avoided and Deferred Equipment Replacement Costs.

This recommended approach has been developed jointly by the IEM and the PWC for each category as directed by the Commission. Below is a summary of the NEBs that were calculated in each program.

- HEEP: captured natural gas (therms), water savings (gal), propane savings (gal) and ARCs (\$);
- CWA: captured natural gas (therms), water savings (gal), and ARCs (\$); and
- CEEP: captured natural gas (therms), and ARCs (\$).

Methodologies and measure-level results for each NEB are found in each of the body of the report.

B.4 Cost of Carbon

The Evaluator incorporated the cost of carbon in the cost benefit analysis, a low (\$0/CO₂ price per ton), medium (\$15/CO₂ price per ton), and high value (\$30/CO₂ price per ton).³⁸

The Evaluator utilized the ‘Carbon_pricing_calcs_FINAL’ calculator; the IEM-developed Excel work is identified as Exhibit A; Order 48, Docket 13-002-U.³⁹

The specifics of this ruling included the following:

“Each utility may use its individual discretion in determining the carbon cost pricing assumptions in its EE cost-effectiveness testing, subject to the approval of the Commission in its process for the approval of EE plans in each three-year planning cycle, but the Commission directs that the PWC to propose a consistent mechanism for illustrating the rate and bill impacts of modeling low, medium, and high carbon cost scenarios on the cost-effectiveness of its EE programs. The results of scenarios should be included in future annual SARP reports, including the Annual Reports and Excel Workbooks.”⁴⁰

The selected region was SPSO (SPP South), the cent per energy savings (kWh) is found in the table below.

TABLE B-0-4 UTILITY-SPECIFIC LOW, MEDIUM AND HIGH VALUES

Scenario	CO ₂ Price per ton	¢ / kWh
Per dollar for calculations	per \$	0.080
Low case	\$0	0.000
Middle case	\$15	1.100
High case	\$30	2.300

However, the Evaluator performed the cost-effectiveness testing assuming a cost of carbon of \$0 for the Low, Medium, and High scenarios. This is consistent with the PY2024 evaluation.

³⁸ Ibid.

³⁹ Ibid.

⁴⁰ Ibid.

Results of these scenarios are provided in the following tables.

TABLE B-0-5 NET BENEFITS BY COST TEST

Program	TRC Benefits	UCT Benefits	RIM Benefits	PCT Benefits
Home Energy Efficiency Program	\$1,072,784	\$730,384	-\$2,305,767	\$4,024,006
Consistent Weatherization Approach	\$1,464,253	\$1,287,856	-\$4,829,433	\$8,135,733
Commercial Energy Efficiency Program	\$6,033,388	\$5,696,680	-\$12,320,318	\$18,855,453
Regulatory	\$0	\$0	\$0	\$0
Planning	\$0	\$0	\$0	\$0
Total	\$8,570,424	\$7,714,920	-\$19,455,518	\$31,015,191
Sums may differ due to rounding.				

TABLE B-0-6 NET COSTS BY COST TEST

Program	TRC Costs	UCT Costs	RIM Costs	PCT Costs
Home Energy Efficiency Program	\$1,424,948	\$1,147,021	\$4,183,172	\$879,732
Consistent Weatherization Approach	\$4,202,981	\$3,259,924	\$9,377,214	\$3,068,346
Commercial Energy Efficiency Program	\$4,301,181	\$4,636,428	\$22,653,426	\$1,745,098
Regulatory	\$0	\$0	\$0	\$0
Planning	\$0	\$0	\$0	\$0
Total	\$9,929,109	\$9,043,374	\$36,213,812	\$5,693,175
Sums may differ due to rounding.				

TABLE B-0-7 PORTFOLIO-LEVEL TEST RESULTS

Program	TRC	UCT	RIM	PCT
Home Energy Efficiency Program	1.75	1.64	0.45	5.57
Consistent Weatherization Approach	1.35	1.40	0.48	3.65
Commercial Energy Efficiency Program	2.40	2.23	0.46	11.80
Regulatory	0.00	0.00	0.00	0.00
Planning	0.00	0.00	0.00	0.00
Total	1.86	1.85	0.46	6.45
Sums may differ due to rounding.				

B.5 Marginal Line Losses

The Evaluator, in partnership with OG&E, incorporated marginal line losses into the cost effectiveness analysis. For further details, see Appendix B.6.

B.6 Economic Inputs for Cost-effectiveness Analysis

The Evaluator used the economic inputs provided by OG&E for the cost benefit analysis, this included avoided costs that were estimated using the Real Economic Carrying Charge (RECC) approach. The rates utilized for avoided water and avoided propane use were from Protocol L in the AR TRM v10.0.

The Evaluator used the discount rates provided by OG&E to perform the cost benefit analysis, and these values align with the rates used in the PY2024 to PY2026 Plan. The evaluated net energy savings (kWh) and demand reductions (kW) values utilized in the cost benefit analysis include a line loss factor, those

values are in the table below. Additionally, the table below outlines the discount rates, escalation rate and avoided costs used in the cost-effectiveness analysis.

TABLE B-0-8 ECONOMIC INPUTS FOR COST EFFECTIVENESS ANALYSIS

Discount Rates	
Utility (TRC)	7.17%
Utility (UCT)	7.17%
Utility (RIM)	7.17%
Societal (SCT)	3.04%
Participant (PCT)	6.00%
Cost of Carbon	
Low Scenario (CO2 price per ton)	\$0.00
Medium Scenario (CO2 price per ton)	\$0.00
High Scenario (CO2 price per ton)	\$0.00
Line Losses	
Gas Distribution Losses	2.69%
Line Losses (demand)	8.37%
Line Losses (energy)	8.37%
Line Losses (therm)	2.69%
Escalation rate	2.00%
Avoided Costs	
Avoided Energy (\$/kWh)	\$0.035
Avoided Demand (\$/kW)	\$109
Avoided Natural Gas (\$/therm)	\$0.474
Avoided Water (\$/gallon)	\$0.0099
Avoided Propane (\$/gallon)	\$2.324

TABLE 0-9 OG&E AVOIDED ENERGY & DEMAND VALUES

Year	Avoided Energy Cost by Time Period (\$/kWh)					Avoided Capacity Cost (\$/kW)
	Summer On-Peak	Summer Off-Peak	Winter On-Peak	Winter Off-Peak	Shoulder	
2024	\$0.052	\$0.036	\$0.034	\$0.023	\$0.027	\$107
2025	\$0.053	\$0.037	\$0.035	\$0.023	\$0.028	\$109
2026	\$0.054	\$0.037	\$0.036	\$0.024	\$0.028	\$112
2027	\$0.055	\$0.038	\$0.036	\$0.024	\$0.029	\$114
2028	\$0.056	\$0.039	\$0.037	\$0.025	\$0.030	\$116
2029	\$0.057	\$0.040	\$0.038	\$0.025	\$0.030	\$118
2030	\$0.058	\$0.040	\$0.039	\$0.026	\$0.031	\$121
2031	\$0.060	\$0.041	\$0.039	\$0.026	\$0.031	\$123
2032	\$0.061	\$0.042	\$0.040	\$0.027	\$0.032	\$126
2033	\$0.062	\$0.043	\$0.041	\$0.027	\$0.033	\$128
2034	\$0.063	\$0.044	\$0.042	\$0.028	\$0.033	\$131
2035	\$0.065	\$0.045	\$0.043	\$0.028	\$0.034	\$133
2036	\$0.066	\$0.046	\$0.043	\$0.029	\$0.035	\$136
2037	\$0.067	\$0.046	\$0.044	\$0.029	\$0.035	\$139
2038	\$0.069	\$0.047	\$0.045	\$0.030	\$0.036	\$142
2039	\$0.070	\$0.048	\$0.046	\$0.031	\$0.037	\$144
2040	\$0.071	\$0.049	\$0.047	\$0.031	\$0.038	\$147
2041	\$0.073	\$0.050	\$0.048	\$0.032	\$0.038	\$150
2042	\$0.074	\$0.051	\$0.049	\$0.032	\$0.039	\$153
2043	\$0.076	\$0.052	\$0.050	\$0.033	\$0.040	\$156

TABLE B- 0-10 OG&E NEB VALUES

Year	\$/Therm	\$/Gallon LP	\$/Gallon Water
2024	\$0.474	\$2.278	\$0.010
2025	\$0.483	\$2.324	\$0.010
2026	\$0.493	\$2.370	\$0.010
2027	\$0.503	\$2.418	\$0.010
2028	\$0.513	\$2.466	\$0.011
2029	\$0.523	\$2.515	\$0.011
2030	\$0.534	\$2.566	\$0.011
2031	\$0.544	\$2.617	\$0.011
2032	\$0.555	\$2.669	\$0.011
2033	\$0.566	\$2.723	\$0.012
2034	\$0.578	\$2.777	\$0.012
2035	\$0.589	\$2.833	\$0.012
2036	\$0.601	\$2.889	\$0.012
2037	\$0.613	\$2.947	\$0.013
2038	\$0.625	\$3.006	\$0.013
2039	\$0.638	\$3.066	\$0.013
2040	\$0.650	\$3.128	\$0.013
2041	\$0.663	\$3.190	\$0.014
2042	\$0.677	\$3.254	\$0.014
2043	\$0.690	\$3.319	\$0.014

Appendix C Survey-Based Free-Ridership Results

This section presents tables of responses to the free-ridership results survey questions. The results are presented for each of the following survey instruments:

- PEH Builder Survey
- CEEP – Small Business, Large C&I, SAGE.
- CEEP -- Midstream

Questions are tabulated based on the responses used in the NTG analysis. This may include responses dropped because the questions were skipped by the respondent as well as questions repeated because the respondent was asked about multiple measures. As a result, the counts of responses presented in the following tables may not equal the number of survey responses.

C.2 Home Energy Efficiency Program - PEH

How influential were each of the following Positive Energy Home program features in your decision to build qualifying homes in 2025? - The rebates provided by the program	Percent (n = 2)
1 (Not at all influential)	0.0%
2	0.0%
3	0.0%
4	50.0%
5 (Extremely influential)	50.0%
Don't know	0.0%
Not applicable	0.0%
How influential were each of the following Positive Energy Home program features in your decision to build qualifying homes in 2025? - Any technical assistance you received	Percent (n = 2)
1 (Not at all influential)	0.0%
2	0.0%
3	0.0%
4	0.0%
5 (Extremely influential)	100.0%
Don't know	0.0%
Not applicable	0.0%
How influential were each of the following Positive Energy Home program features in your decision to build qualifying homes in 2025? - Program informational documents or marketing materials	Percent (n = 2)
1 (Not at all influential)	0.0%
2	0.0%
3	50.0%
4	50.0%
5 (Extremely influential)	0.0%
Don't know	0.0%
Not applicable	0.0%

If the OG&E Positive Energy New Homes program did not exist	Percent (n = 2)
1 (Not at all likely)	0.0%
2	0.0%
3	100.0%
4	0.0%
5 (Very likely)	0.0%
Don't know	0.0%
What specific construction elements have you added to your standard homes since you first joined the program?	Percent (n = 2)
Higher insulation levels	50.0%
Better air-sealing / lower blower-door target	50.0%
Higher-efficiency HVAC equipment	50.0%
Duct sealing or ducts inside conditioned space	50.0%
Low-U-factor or low-SHGC windows	100.0%
High-efficiency water heater	0.0%
LED lighting as standard	0.0%
Smart / programmable thermostats	0.0%

C.1 Business/Industrial Solutions Program Participant Survey Results – Large C&I and SAGE

Would you have been financially able to install the equipment or measures without the financial incentive from the Program?	Percent (n = 9)
Yes	55.6%
No	44.4%
Don't know	0.0%
To confirm, your organization would NOT have allocated the funds to complete a similar energy saving project if the program incentive was not available. Is that correct?	Percent (n = 4)
Yes	100.0%
No	0.0%
Don't know	0.0%
Did you have plans to install the measure before participating in the program?	Percent (n = 9)
Yes	44.4%
No	55.6%
Don't know	0.0%
Would you have completed the project even if you had not participated in the program?	Percent (n = 9)
Yes	33.3%
No	66.7%
Don't know	0.0%

If the incentive from the Program had not been available, how likely is it that you would have installed [Equipment/Measure] anyway?	Percent (n = 9)
Definitely would have	22.2%
Probably would have	11.1%
Probably would not have	44.4%
Definitely would not have	11.1%
Don't know	11.1%
Did you choose equipment that was more energy efficient than you would have chosen had you not participated in the program? [SKIP, IF MEASURE = CONTROLS]	Percent (n = 8)
Yes	25.0%
No	75.0%
Don't know	0.0%
How important was previous experience with the Program in making your decision to install [Equipment/Measure]?	Percent (n = 5)
Very important	0.0%
Somewhat important	0.0%
Only slightly important	20.0%
Not at all important	80.0%
Don't know	0.0%
If the Program representative had not recommended implementing the [Equipment/Measure], how likely is it that you would have implemented it anyway?	Percent (n = 6)
Definitely would have	16.7%
Probably would have	16.7%
Probably would not have	16.7%
Definitely would not have	33.3%
Don't know	16.7%
Not including the project that your organization received an incentive for in [YEAR], has your organization completed any significant energy efficiency projects in the last three years?	Percent (n = 9)
Yes	77.8%
No	11.1%
Don't know	11.1%
Did you complete any of those projects without receiving a program incentive or rebate?	Percent (n = 7)
Yes	42.9%
No	57.1%
Don't know	0.0%

In the last three years, did you complete any energy efficiency projects similar to the [MEASURE] project implemented at the facility located at [LOCATION]?	Percent (n = 7)
Yes	42.9%
No	57.1%
Don't know	0.0%
Did you install the [MEASURE1] earlier than you otherwise would have without the program?	Percent (n = 9)
Yes	11.1%
No	77.8%
Don't know	11.1%
In the last three years, did you complete any energy efficiency projects similar to the [MEASURE] project implemented at the facility located at [LOCATION]?	Percent (n = 1)
within 6 months	0.0%
7 months to 1 year	0.0%
more than 1 year up to 2 years	0.0%
more than 2 years up to 3 years	100.0%
more than 3 years up to 5 years	0.0%
More than 5 years	0.0%
Don't know	0.0%

C.2 Business/Industrial Solutions Program Participant Survey Results - SBP

Would you have been financially able to install the equipment or measures without the financial incentive from the Program?	Percent (n = 1)
Yes	0.0%
No	100.0%
Don't know	0.0%
To confirm, your organization would NOT have allocated the funds to complete a similar energy saving project if the program incentive was not available. Is that correct?	Percent (n = 1)
Yes	100.0%
No	0.0%
Don't know	0.0%
Did you have plans to install the measure before participating in the program?	Percent (n = 1)
Yes	0.0%
No	100.0%
Don't know	0.0%

Would you have completed the project even if you had not participated in the program?	Percent (n = 1)
Yes	0.0%
No	100.0%
Don't know	0.0%
If the incentive from the Program had not been available, how likely is it that you would have installed [Equipment/Measure] anyway?	Percent (n = 1)
Definitely would have	0.0%
Probably would have	0.0%
Probably would not have	0.0%
Definitely would not have	100.0%
Don't know	0.0%
Did you choose equipment that was more energy efficient than you would have chosen had you not participated in the program? [SKIP, IF MEASURE = CONTROLS]	Percent (n = 1)
Yes	100.0%
No	0.0%
Don't know	0.0%
How important was previous experience with the Program in making your decision to install [Equipment/Measure]?	Percent (n = 0)
Very important	N/A
Somewhat important	N/A
Only slightly important	N/A
Not at all important	N/A
Don't know	N/A
If the Program representative had not recommended implementing the [Equipment/Measure], how likely is it that you would have implemented it anyway?	Percent (n = 1)
Definitely would have	0.0%
Probably would have	0.0%
Probably would not have	0.0%
Definitely would not have	100.0%
Don't know	0.0%
Not including the project that your organization received an incentive for in [YEAR], has your organization completed any significant energy efficiency projects in the last three years?	Percent (n = 1)
Yes	0.0%
No	100.0%
Don't know	0.0%

Did you complete any of those projects without receiving a program incentive or rebate?	Percent (n = 0)
Yes	N/A
No	N/A
Don't know	N/A
In the last three years, did you complete any energy efficiency projects similar to the [MEASURE] project implemented at the facility located at [LOCATION]?	Percent (n = 0)
Yes	N/A
No	N/A
Don't know	N/A
Did you install the [MEASURE1] earlier than you otherwise would have without the program?	Percent (n = 1)
Yes	100.0%
No	0.0%
Don't know	0.0%
In the last three years, did you complete any energy efficiency projects similar to the [MEASURE] project implemented at the facility located at [LOCATION]?	Percent (n = 1)
within 6 months	0.0%
7 months to 1 year	0.0%
more than 1 year up to 2 years	0.0%
more than 2 years up to 3 years	0.0%
more than 3 years up to 5 years	0.0%
More than 5 years	100.0%
Don't know	0.0%

C.2 Commercial Energy Efficiency Program - Midstream

Prior to the purchase of the energy efficient [Field-EQUIPMENT_TYPE] in [Field-YEAR], had your company installed similar energy efficient [Field-EQUIPMENT_TYPE]?	Percent (n = 3)
1 (Not at all influential)	66.7%
2	33.3%
Did you complete any of those projects without receiving a program incentive?	Percent (n = 2)
1 (Not at all influential)	50.0%
2	0.0%
Don't know	50.0%

How important were each of the following factors in your decision to purchase the [Field-EQUIPMENT_TYPE]? - The availability of the discount	Percent (n = 3)
1 (Not at all important)	0.0%
2	0.0%
3	0.0%
4	0.0%
5	0.0%
6	0.0%
7	0.0%
8	0.0%
9	33.3%
10 (Very important)	66.7%
Not applicable	0.0%
How likely is it that you would have purchased the energy efficient [Field-EQUIPMENT_TYPE] if the OG&E discounts were not available?	Percent (n = 3)
Definitely would not have	0.0%
Probably would not have	66.7%
Probably would have	33.3%
Definitely would have	0.0%
Did your organization learn about the [Field-EQUIPMENT_TYPE] discounts available before you made the decision to purchase the energy efficient [Field-EQUIPMENT_TYPE], at the time you made the purchase, or after the purchase had been made?	Percent (n = 3)
Definitely would not have	100.0%
Probably would not have	0.0%
Probably would have	0.0%
Definitely would have	0.0%
Do you think your organization would still have purchased the energy efficient [Field-EQUIPMENT_TYPE] if the discounts were not available?	Percent (n = 0)
Yes	N/A
No	N/A
Not sure	N/A
Without the discounts from OG&E, do you think you would have installed the exact same energy efficient [Field-EQUIPMENT_TYPE], or would you have done something different?	Percent (n = 3)
1 (Not at all likely)	33.3%
2	0.0%
3	0.0%
4	0.0%
5 (Very likely)	0.0%
Don't know	66.7%

Appendix D C&I Site Level Reports

EA-0001584624

EXECUTIVE SUMMARY

This facility is a cold storage that implemented underfloor heating. The space refrigerated the storage using ammonia compressors. The facility installed a plate and frame heat exchanger, circulating pump, piping, and controls to prevent damage to the warehouse floor. The kWh realization rate for this project is 100% and the peak coincidence kW realization rate 100%.

PROJECT DESCRIPTION

This project consisted of the following implementations:

- Plate and Frame Heat Exchanger
- Circulating Pump
- Piping
- Controls

MEASUREMENT AND VERIFICATION EFFORT

The Evaluator performed a desk review to verify the installation of the waste recovery underfloor heating. During the desk review the motor specs, annual operation hours, and utilization percentage were verified to be accurate versus the ex-ante expectations. Savings are calculated using the motor specs, annual operation hours, and utilization using the approach from the verified M&V Plan and white paper. The following equations were used to calculate the annual energy savings:

$$kW_{\text{Pump}} = \frac{hp_{\text{nameplate}} * 0.7457 \frac{kW}{hp}}{Eff_{\text{nameplate}}}$$

$$kWh_{\text{Pump}} = kW_{\text{Pump}} * AOH_{\text{motor}}$$

$$\text{Annual Heat Recovered} = \text{Heat Recovered} * AOH$$

$$kWh_{\text{Savings}} = \frac{\text{Annual Heat Recovered}}{3,412 \frac{Btu}{kWh}} * Utilization\% - kWh_{\text{Pump}}$$

$$kW_{\text{Savings}} = kWh_{\text{Savings}} / AOH$$

Where:

$$kW_{\text{pump}} = \text{Energy consumption from pump}$$

$hp_{nameplate}$ = Rated horsepower of motor
 0.7457 = Conversion from hp to kW
 $Eff_{nameplate}$ = Quantity of fixtures either being removed or installed
 kWh_{pump} = Energy consumption from pump for total operation hours
 AOH_{Motor} = Annual operating hours for motor
Heat Recovered = Flow rate * density * specific heat * temperature difference
Ann. Heat Recovered = Heat recovered over the course of a year
AOH = Annual operating hours for entire year
Utilization% = Percent of the system utilized

TABLE 0-1 SAVINGS PARAMETERS

Measure	Motor HP	Motor Efficiency	Motor AOH	Inlet Temp	Outlet Temp
Underfloor Heating	7.5	91.7%	5,694	1.20	0.90

TABLE 0-2 ENERGY SAVINGS

Measure	Expected kWh Savings	Realized kWh Savings	Realization Rate	EUL	Lifetime Savings
Underfloor Heating	932,335	932,335	100%	10	9,323,349
Total	932,335	932,335	100%		9,323,349

TABLE 0-3 PEAK KW REDUCTION

Measure	AOH	Expected Peak kW Reductions	Realized Peak kW Reductions	Realization Rate
Underfloor Heating	8,760	106.43	106.43	100.0%
Total		106.43	106.43	100.0%

RESULTS

TABLE 0-4 VERIFIED GROSS SAVINGS/REALIZATION RATES

Metric	Expected	Measured	Realization Rate
Coincident Peak kW	106.43	106.43	100.0%
Annual kWh	932,335	932,335	100.0%
Therms	-	-	-

The kWh realization rate for this project is 100% and the peak coincidence kW realization rate 100%. The Evaluator did not find any discrepancies between the expected savings and the verified savings.

EA-0005398104

EXECUTIVE SUMMARY

This facility is a retailer that has installed new lighting at their 31,740 square foot facility. The facility installed (77) 33W LED fixtures, four 17W LED fixtures, seven 37W LED fixtures, and two 148W LED fixtures. The space has gas heating and air conditioning throughout the interior. There is no heating or cooling present on the exterior. The kWh realization rate for this project is 87% and the peak coincidence kW realization rate 95%.

PROJECT DESCRIPTION

This project consisted of the following retrofits:

- (77) 33W LED fixtures
- (4) 17W LED fixtures
- (7) 37W LED fixtures
- (2) 148W LED fixtures

MEASUREMENT AND VERIFICATION EFFORT

The Evaluator performed a desk review to verify the installation of new lighting fixtures. During the desk review the lamp quantity, lamp type, and space type were verified to be accurate versus the ex-ante expectations. Savings are calculated using the lamp type, quantity and location using the approach from the AR TRM v10 Section 3.6.3 Lighting Efficiency. The following equations were used to calculate the annual energy savings from the retrofit:

$$kWh_{Savings} = \sum \left(\left[N_{fixt(i)} \times \frac{W_{fixt(i)}}{1000} \right]_{pre} - \left[N_{fixt(i)} \times \frac{W_{fixt(i)}}{1000} \right]_{post} \right) \times AOH \times IEF_E$$

$$kW_{Savings} = \sum \left(\left[N_{fixt(i)} \times \frac{W_{fixt(i)}}{1000} \right]_{pre} - \left[N_{fixt(i)} \times \frac{W_{fixt(i)}}{1000} \right]_{post} \right) \times CF \times IEF_D$$

$$therms_{penalty} = kWh_{savings} \times IEF_G$$

Where:

$kWh_{savings}$	= Annual energy savings
$kW_{savings}$	= Peak energy demand reduction
N_{fixt}	= Quantity of fixtures either being removed or installed
W_{fixt}	= Rated wattage of the fixture being removed or installed
AOH	= Annual operating hours for specified building type
IEF_E	= Interactive effects factor for energy savings
IEF_D	= Interactive effects factor for demand savings

IEF_G = Interactive effects factor for gas heating savings

CF = Peak demand coincidence factor

pre = Denotes pre-installation state

post = Denotes post-installation state

TABLE 0-5 SAVINGS PARAMETERS

Measure	Quantity (Fixtures)	Hours	IEFe	IEFd	CF	EUL
LED033-FIXT	77	3,965	1.09	1.20	0.90	15
LED017-FIXT	4	3,965	1.09	1.20	0.90	15
LED037-FIXT	7	3,996	1.00	1.00	0.00	15
LED148-FIXT	2	3,996	1.00	1.00	0.00	15

TABLE 0-6 ENERGY SAVINGS

Measure	Expected kWh Savings	Realized kWh Savings	Realization Rate	EUL	Lifetime Savings
LED033-FIXT	66,700	56,197	84%	15	842,956
LED017-FIXT	1,785	1,503	84%	15	22,558
LED037-FIXT	4,671	4,819	103%	15	72,287
LED148-FIXT	112,89	11,288	100%	15	169,333
Total	84,445	73,809	87.4%		1,107,136

TABLE 0-7 PEAK kW REDUCTION

Measure	CF	IEFd	Expected Peak kW Reductions	Realized Peak kW Reductions	Realization Rate
LED033-FIXT	0.90	1.20	14.8	14.0	95%
LED017-FIXT	0.90	1.20	0.40	0.38	95%
LED037-FIXT	0.00	1.00	0.00	0.00	-
LED148-FIXT	0.00	1.00	0.00	0.00	-
Total			15.2	14.4	95%

RESULTS

TABLE 0-8 VERIFIED GROSS SAVINGS/REALIZATION RATES

Metric	Expected	Measured	Realization Rate
Coincident Peak kW	15.2	14.4	95%
Annual kWh	84,445	73,809	87%
Therms	-	-	-

The kWh realization rate for this project is 87% and the peak coincidence kW realization rate 95%.

During the desk review, Evaluator verified the listed fixture type and quantity provided in the ex-post calculator, and the prescriptive TRM values for the AOH, IEFE, IEFD, and CF. The prescriptive building type used was “Retail: Excluding Malls & Strip Centers” for all indoor spaces and “Outdoor” for exterior spaces because it best fits the space description where the lighting retrofit took place.

The following table is a list of changes between the ex-ante and ex-post calculators:

TABLE 0-9 CAUSES OF DISCREPANCY

Variable	Ex-Ante	Ex-Post	Reason
LED037-FIXT Quantity	8	7	The invoice indicated the fixture quantity was less than what was presented in the ex-ante analysis; therefore, the Evaluator changed the quantity to seven to match the invoice.
Building Type	Non-24-hour Retail	Retail: Excluding Malls & Strip Centers	Using the TRM building types, “Retail: Excluding Malls & Strip Centers” best fit the site.

EA-0003792923

EXECUTIVE SUMMARY

This facility is a newly constructed manufacturing plant with fourteen (14) large industrial fans used for ventilation of manufacturing and process spaces. The motors powering these fans, which were previously controlled using air foils, have been installed with VFDs to more efficiently match process-based ventilation loads. The kWh realization rate for this project is 99% and the peak coincidence kW realization rate 96%.

PROJECT DESCRIPTION

This project consisted of the following retrofits:

- (1) 2150 HP Fan Motor w/ VFD
- (4) 200 HP Fan Motor w/ VFD
- (3) 150 HP Fan Motor w/ VFD
- (1) 125 HP Fan Motor w/ VFD
- (1) 100 HP Fan Motor w/ VFD
- (2) 60 HP Fan Motor w/ VFD
- (2) 40 HP Fan Motor w/ VFD

MEASUREMENT AND VERIFICATION EFFORT

The Evaluator performed a desk review to verify the operation of the installed VFDs. The implementer provided trend data of motor percent speed at 5-minute intervals covering a period of at least five (5) days for each motor. This trend data was used in conjunction with motor nameplate horsepower, motor design load factor, and standard UMP fan curves to calculate the average kW demand of each motor with damper speed control and with VFD speed control. The trend data was also used to determine the percentage of time that each motor operated, which allowed for the calculation of annual energy usage. The annual usage of each motor with and without a VFD was then compared to determine total annual energy savings.

$$kWh_{savings} = \sum \left((FlowFraction \times PartLoadRatio_{baseline}) - (FlowFraction \times PartLoadRatio_{post}) \right) \times RatedHorsePower \\ \times Conversion Factor \times LF \times \frac{1}{\eta_{motor}} \times AOH$$

$$kW_{savings} = \sum \left((PartLoadRatio_{baseline}) - (PartLoadRatio_{post}) \right) \times RatedHorsePower \\ \times Conversion Factor \times LF \times \frac{1}{\eta_{motor}} \times kW_{factor}$$

$$FlowFraction = a + bx + cx^2$$

Where:

$kWh_{savings}$	= Annual energy savings
$kW_{savings}$	= Peak energy demand reduction
AOH	= Annual operating hours for specified building type
$RateHorsePower$	= Nameplate horsepower of the motor
$ConversionFactor$	= .746kW/HP
kW_{factor}	= Ratio of real performance power to power delivered
η_{motor}	= Energy efficiency rating for equipment
$FlowFraction$	= Percent of motor runtime within a range of fractional flow
$PartLoadRatio$	= Part load ration of the motor, based on method of flow control, within range of fractional flow
x	= Decimal percent of full power
a, b, c	= Correlation coefficients

TABLE 0-10 PART LOAD RATIOS

% Design CFM	Airfoil Damper % Part Load Ratio	VFD % Design Input Part Load Ratio
100	105.2	102.93
90	102.1	79.5
80	96.3	59.75
70	88.7	43.46
60	80.2	30.38
50	71.5	20.27
40	63.6	12.89
30	57.2	8
20	53.3	5.37
10	52.6	4.75

TABLE 0-11 ENERGY SAVINGS

Measure	Fan HP	Expected kWh Savings	Realized kWh Savings	Realization Rate	EUL	Lifetime Savings
Motor 1	2150	3,257,439	3,119,612	96%	15	46,794,184
Motor 2	200	498,762	525,973	105%	15	7,889,594
Motor 3	200	316,271	306,356	97%	15	4,595,334
Motor 4	200	215,581	192,478	89%	15	2,887,170
Motor 5	200	492,065	516,805	105%	15	7,752,082

Measure	Fan HP	Expected kWh Savings	Realized kWh Savings	Realization Rate	EUL	Lifetime Savings
Motor 6	150	378,273	396,791	105%	15	5,951,871
Motor 7	150	378,265	396,698	105%	15	5,950,464
Motor 8	150	378,258	396,782	105%	15	5,951,727
Motor 9	125	294,371	303,696	103%	15	4,555,445
Motor 10	100	203,089	203,720	100%	15	3,055,805
Motor 11	60	152,433	158,768	104%	15	2,381,522
Motor 12	60	122,217	122,752	100%	15	1,841,274
Motor 13	40	74,122	72,843	98%	15	1,092,649
Motor 14	40	95,207	97,857	103%	15	1,467,860
Total	3,825	3,257,439	3,119,612	99%	15	102,166,983

TABLE 0-12 PEAK kW REDUCTION

Measure	Fan HP	Expected Peak kW Reductions	Realized Peak kW Reductions	Realization Rate
Motor 1	2150	386.7	356.1	92%
Motor 2	200	59.2	60.0	101%
Motor 3	200	38.0	35.3	93%
Motor 4	200	25.6	22.0	86%
Motor 5	200	58.4	59.0	101%
Motor 6	150	44.9	45.3	101%
Motor 7	150	44.9	45.3	101%
Motor 8	150	44.9	45.3	101%
Motor 9	125	34.9	34.7	99%
Motor 10	100	24.1	23.3	96%
Motor 11	60	18.1	18.1	100%
Motor 12	60	14.5	14.0	97%
Motor 13	40	8.8	8.3	95%
Motor 14	40	11.3	11.2	99%
Total	3,825	814.33	777.90	96%

RESULTS

TABLE 0-13 VERIFIED GROSS SAVINGS/REALIZATION RATES

Metric	Expected	Measured	Realization Rate
Coincident Peak kW	814	778	96%
Annual kWh	6,856,352	6,811,132	99%

The kWh realization rate for this project is 99% and the peak coincidence kW realization rate is 96%.

The ex-post calculator applied VFD drive losses, power factor, and unmodified AOH in its calculations of energy use. The ex-ante calculator contained these values but did not apply them in its calculations of energy use.

The following table is a list of changes between the ex-ante and ex-post calculators:

TABLE 0-14 CAUSES OF DISCREPANCY

Variable	Ex-Ante	Ex-Post
AOH	AOH based on trend data was reduced by 336 hours	AOH based on trend data was not reduced
Power Factor (applied)	1.00	0.97
Drive Losses (applied)	0%	5%

EA-0004857605

EXECUTIVE SUMMARY

This facility is a furniture store that has performed a lighting retrofit. Additionally, the site removed (95) 4' 10L T5HO fixtures, (21) 4' 6L T5HO fixtures, and eight 4' 2L T8 fixtures. The facility replaced (662) 4' 4L T5HO fixtures, (30) 450W MH fixtures, (72) 4' 4L T8 fixtures, four 1L T12ES U-Tube fixtures, and (38) 400W MH fixtures with (440) 90W LED fixtures, (220) 210W LED fixtures, (30) 311W LED fixtures, (72) 45W LED fixtures, four 35W LED fixtures, and (38) 125W LED fixtures. The space has gas heating and air conditioning throughout the facility, except exterior areas. The kWh realization rate for this project is 102% and the peak coincidence kW realization rate 99%.

PROJECT DESCRIPTION

This project consisted of the following retrofits:

- (95) 4' 10L T5HO fixtures removed
- (440) 90W LED - Non-Int. Ballast fixtures replacing (462) 4' 4L T5HO fixtures
- (220) 210W LED - Non-Int. Ballast fixtures replacing (220) 4' 4L T5HO fixtures
- (21) 4' 6L T5HO fixtures removed
- (8) 4' 2L T8 fixtures removed
- (30) 311W LED - Non-Int. Ballast fixtures replacing (30) 450W MH fixtures
- (72) 45W LED - Non-Int. Ballast fixtures replacing (72) 4' 4L T8 fixtures
- (4) 35W LED - Non-Int. Ballast fixtures replacing (4) 1L T12ES U-Tube fixtures
- (38) 125W LED - Non-Int. Ballast fixtures replacing (38) 400W MH fixtures

MEASUREMENT AND VERIFICATION EFFORT

The Evaluator performed a desk review to verify the installation of lighting fixtures and re-lamping. During the desk review the lamp quantity, lamp type, and space type were verified to be accurate versus the ex-ante expectations. Savings are calculated using the lamp type, quantity and location using the approach from the AR TRM v10 Section 3.6.3 Lighting Efficiency. The following equations were used to calculate the annual energy savings from the retrofit:

$$kWh_{Savings} = \sum \left(\left[N_{fixt(i)} \times \frac{W_{fixt(i)}}{1000} \right]_{pre} - \left[N_{fixt(i)} \times \frac{W_{fixt(i)}}{1000} \right]_{post} \right) \times AOH \times IEF_E$$

$$kW_{Savings} = \sum \left(\left[N_{fixt(i)} \times \frac{W_{fixt(i)}}{1000} \right]_{pre} - \left[N_{fixt(i)} \times \frac{W_{fixt(i)}}{1000} \right]_{post} \right) \times CF \times IEF_D$$

$$therms_{penalty} = kWh_{savings} \times IEF_G$$

Where:

$kWh_{savings}$	= Annual energy savings
$kW_{savings}$	= Peak energy demand reduction
N_{fixt}	= Quantity of fixtures either being removed or installed

W_{fixt}	= Rated wattage of the fixture being removed or installed
AOH	= Annual operating hours for specified building type
IEF_E	= Interactive effects factor for energy savings
IEF_D	= Interactive effects factor for demand savings
IEF_G	= Interactive effects factor for gas heating savings
CF	= Peak demand coincidence factor
<i>pre</i>	= Denotes pre-installation state
<i>post</i>	= Denotes post-installation state

TABLE 0-15 SAVINGS PARAMETERS

Measure	Pre Quantity (Fixtures)	Post Quantity (Fixtures)	Pre Wattage	Post Wattage	Hours	IEFe
F410GPHL/3-H to F410GPHL/3-H	95	0	577	577	6,631	1.09
F44GPHL-H to LED090-FIXT	462	440	230	90	6,631	1.09
F44GPHL-H to LED210-FIXT	220	220	230	210	6,631	1.09
F46GPHL/2-H to F46GPHL/2-H	21	0	362	362	6,631	1.09
F48ILL/2 to F48ILL/2	30	0	224	224	6,631	1.09
F42ILL to F42ILL	8	0	58	58	6,631	1.09
MH450/1 to LED311-FIXT	30	30	499	311	3,996	1.00
F44ILL to LED045-FIXT	72	72	112	45	6,631	1.09
FU2EE to LED035-FIXT	4	4	60	35	6,631	1.09
MH400/1 to LED125-FIXT	38	38	453	125	3,996	1.00

TABLE 0-16 ENERGY SAVINGS

Measure	Expected kWh Savings	Realized kWh Savings	Realization Rate	EUL	Lifetime Savings
F410GPHL/3-H to F410GPHL/3-H	257,524	257,524	100%	-	-
F44GPHL-H to LED090-FIXT	313,173	313,173	100%	15	4,697,594
F44GPHL-H to LED210-FIXT	20,671	20,671	100%	15	310,072
F46GPHL/2-H to F46GPHL/2-H	35,715	35,715	100%	-	-
F48ILL/2 to F48ILL/2	31,571	31,571	100%	-	-
F42ILL to F42ILL	2,180	2,180	100%	-	-
MH450/1 to LED311-FIXT	22,537	33,722	150%	15	505,834
F44ILL to LED045-FIXT	34,867	34,867	100%	15	523,003
FU2EE to LED035-FIXT	723	723	100%	15	10,842
MH400/1 to LED125-FIXT	49,806	56,449	113%	15	846,742
Total	768,767	786,596	102%		6,894,086

TABLE 0-17 PEAK kW REDUCTION

Measure	CF	IEFd	Expected Peak kW Reductions	Realized Peak kW Reductions	Realization Rate
F410GPHL/3-H to F410GPHL/3-H	0.89	1.20	43.32	41.44	95.7%
F44GPHL-H to LED090-FIXT	0.89	1.20	52.68	50.39	95.7%
F44GPHL-H to LED210-FIXT	0.89	1.20	3.48	3.33	95.7%
F46GPHL/2-H to F46GPHL/2-H	0.89	1.20	6.01	5.75	95.7%
F48ILL/2 to F48ILL/2	0.89	1.20	5.31	5.08	95.7%
F42ILL to F42ILL	0.89	1.20	0.37	0.35	94.6%
MH450/1 to LED311-FIXT	0.00	1.00	-	2.43	-
F44ILL to LED045-FIXT	0.89	1.20	5.15	5.15	100%
FU2EE to LED035-FIXT	0.89	1.20	0.11	0.11	100%
MH400/1 to LED125-FIXT	0.00	1.00	-	1.24	-
Total			116	115	99.0%

RESULTS

TABLE 0-18 VERIFIED GROSS SAVINGS/REALIZATION RATES

Metric	Expected	Measured	Realization Rate
Coincident Peak kW	116	115	99.0%
Annual kWh	768,767	786,596	102%
Therms	-	-	-

The kWh realization rate for this project is 102% and the peak coincidence kW realization rate 99%.

During the desk review, Evaluator verified the listed fixture type and quantity provided in the ex-post calculator, and the prescriptive TRM values for the AOH, IEFE, IEFD, and CF. The prescriptive building type used was “Manufacturing 3 Shift” for all indoor spaces and “Outdoor” for exterior spaces because it best fits the space description where the lighting retrofit took place.

The following table is a list of changes between the ex-ante and ex-post calculators:

TABLE 0-19 CAUSES OF DISCREPANCY

Variable	Ex-Ante	Ex-Post	Reason
F44GPHL-H	211W	230W	Evaluator's adjusted baseline causes different wattage values from implementers
CF	0.23	0.26	Evaluator's staff uses AR TRM v10 values for the coincidence factor.
LED311-FIXT	None	OS	During the desk review, evaluation used the DLC to confirm that the fixture model has occupancy sensors.
LED125-FIXT	None	OS	During the desk review, evaluation used the DLC to confirm that the fixture model has occupancy sensors.

EA-0005100537

EXECUTIVE SUMMARY

This facility is a manufacturer that installed variable frequency drives (VFDs) on their pump motors. The following are pumps that received VFDs: bow screen pump, dump chest pump, low pressure (LP) shower water pump, pulper 1 pump, pulper 2 pump, and the WW3 pump. Evaluator received pump motor speed data from 1/6/2025 to 1/13/2025. The kWh realization rate for this project is 113% and the peak coincidence kW realization rate 113%.

PROJECT DESCRIPTION

This project consisted of the following retrofits:

- (1) 250 HP Fan Motor w/ VFD
- (3) 200 HP Fan Motor w/ VFD
- (2) 400 HP Fan Motor w/ VFD

MEASUREMENT AND VERIFICATION EFFORT

The Evaluator performed a desk review to verify the operation of the installed VFDs. The implementer provided trend data of motor percent speed at 5-minute intervals covering a period of at least five (5) days for each motor. This trend data was used in conjunction with motor nameplate horsepower, motor design load factor, and standard UMP fan curves to calculate the average kW demand of each motor with damper speed control and with VFD speed control. The trend data was also used to determine the percentage of time that each motor operated, which allowed for the calculation of annual energy usage. The annual usage of each motor with and without a VFD was then compared to determine total annual energy savings.

$$kWh_{savings} = \sum \left((FlowFraction \times PartLoadRatio_{baseline}) - (FlowFraction \times PartLoadRatio_{post}) \right) \times RatedHorsePower \times ConversionFactor \times LF \times \frac{1}{\eta_{motor}} \times AOH$$

$$kW_{savings} = \sum \left((PartLoadRatio_{baseline}) - (PartLoadRatio_{post}) \right) \times RatedHorsePower \times ConversionFactor \times LF \times \frac{1}{\eta_{motor}} \times kW_{factor}$$

$$FlowFraction = a + bx + cx^2$$

Where:

$kWh_{savings}$ = Annual energy savings

$kW_{savings}$ = Peak energy demand reduction

<i>AOH</i>	= Annual operating hours for specified building type
<i>RateHorsePower</i>	= Nameplate horsepower of the motor
<i>ConversionFactor</i>	= .746kW/HP
<i>kW_{factor}</i>	= Ratio of real performance power to power delivered
<i>η_{motor}</i>	= Energy efficiency rating for equipment
<i>FlowFraction</i>	= Percent of motor runtime within a range of fractional flow
<i>PartLoadRatio</i>	= Part load ration of the motor, based on method of flow control, within range of fractional flow
<i>x</i>	= Decimal percent of full power
<i>a, b, c</i>	= Correlation coefficients

TABLE 0-20 PART LOAD RATIOS

% Design CFM	Throttle Valve % Part Load Ratio	VFD % Part Load Ratio
100	99.91	102.79
90	97.15	79.4
80	94.01	59.53
70	90.49	43.19
60	86.59	30.37
50	82.31	21.07
40	77.65	15.3
30	72.61	13.05
20	67.19	14.32
10	61	19

TABLE 0-21 ENERGY SAVINGS

Measure	Fan HP	Expected kWh Savings	Realized kWh Savings	Realization Rate	EUL	Lifetime Savings
VFD for Pumps – Bow Screen	200	372,502	373,660	100%	15	5,604,904
VFD for Pumps – Dump Chest	250	770,062	771,613	100%	15	11,574,193
VFD for Pumps – LP Shower	400	670,059	671,877	100%	15	10,078,153
VFD for Pumps – Pulper 1	200	474,793	475,392	100%	15	7,130,874
VFD for Pumps – Pulper 2	200	471,489	471,489	100%	15	7,072,342
VFD for Pumps – WW3	400	1,210,805	1,210,805	100%	15	18,162,074
Total	-	3,529,998	3,974,836	113%	-	59,622,541

TABLE 0-22 PEAK kW REDUCTION

Measure	Fan HP	Expected Peak kW Reductions	Realized Peak kW Reductions	Realization Rate
VFD for Pumps – Bow Screen	200	44.2	44.4	100%
VFD for Pumps – Dump Chest	250	91.4	91.6	100%
VFD for Pumps – LP Shower	400	79.5	79.76	100%
VFD for Pumps – Pulper 1	200	56.4	56.4	100%
VFD for Pumps – Pulper 2	200	55.9	56.0	100%
VFD for Pumps – WW3	400	143	144	100%
Total	-	419	472	113%

RESULTS

TABLE 0-23 VERIFIED GROSS SAVINGS/REALIZATION RATES

Metric	Expected	Measured	Realization Rate
Coincident Peak kW	419	472	113%
Annual kWh	3,529,998	3,974,836	113%

The kWh realization rate for this project is 113% and the peak coincidence kW realization rate 113%.

During the desk review, the Evaluator verified the motor specs, annual operation hours, and data. The Evaluator verified the methodology was accurate; however, annual operation hours caused discrepancies in savings. The prescriptive building type is a “Manufacturing”.

The following table is a list of changes between the ex-ante and ex-post calculators:

TABLE 0-24 CAUSES OF DISCREPANCY

Variable	Ex-Ante	Ex-Post	Reason
AOH	8,417	8,424	The Evaluator calculated the annual operation hours using the percent design CFM and power. The Evaluator used a percent design CFM range from 10% - 100%, while ex-ante calculations use a minimum of 20%.
AOH	8,412	8,424	The Evaluator calculated the annual operation hours using the percent design CFM and power. The Evaluator used a percent design CFM range from 10% - 100%, while ex-ante calculations use a minimum of 20%.

Appendix E Residential Site Visit Findings

This section provides an overview of discrepancies or issues encountered in site visits. The table below contains the field technician's notes for specific projects.

TABLE E-0-1 SITE VISIT FINDINGS OVERVIEW

Channel	Project ID(s)	Measure	Discrepancy Type	Notes
CWA	EA-0005533312, EA-0005676587	Advanced Power Strip	Measure Not In-Use	The APS was not in use by the customer. It was given to them, but it was not being used.
RSOL	EA-0005774679	Advanced Power Strip	Measure Not In-Use	The APS was not in use by the customer. It was given to them, but it was not being used.
RSOL	EA-0005774679	Advanced Power Strip	Measure Not In-Use	The APS was not in use by the customer. It was given to them, but it was not being used.
LI Wx	EA-0004763326, EA-0005491197	Air Infiltration	CFM Test Discrepancy	I didn't see any reason for the lower air test result. All interior doors were open for test.
RSOL	EA-0005774696	Air Infiltration	CFM Test Discrepancy	I did not spot any reasons for the slightly higher air infiltration test as all windows were closed for the test.
CWA	EA-0005589647	Duct Sealing	Project Quality	The trade ally removed insulation from ductwork to seal the seams and connections but did not replace the insulation. The customer was asking if the trade ally could be sent back out to repair the insulation.
RSOL	EA-0005774744	Duct Sealing	CFM Test Discrepancy	I did not spot any reasons for the slightly higher duct test result. There was mastic, mastic tape, and spray foam present on the duct system.
CWA	EA-0004064776, EA-0004831640, EA-0004831715	Duct Sealing	Project Quality	The trade ally did not apply mastic, or mastic tape to supply registers in floors.
CWA	EA-0005749851	Duct Sealing	CFM Test Discrepancy	I received a slightly higher duct test result than the trade ally reported. I did not spot any reason for the discrepancy. There was mastic and mastic tape present on the ductwork – the sealing appeared to be in good shape and not falling apart.
RSOL	EA-0006217211	Low-Flow Showerhead	Measure Not In-Use	The showerhead was given to tenant, but the provided showerhead was replaced and not in use.
RSOL	EA-0006217211	Low-Flow Showerhead	Measure Not In-Use	The showerhead was given to tenant, but the provided showerhead was replaced and not in use.

DUCT & AIR SEALING REBATE

ARKANSAS

APSC FILED Time: 4/29/2026 4:01:07 PM; Recvd: 4/29/2026 3:58:54 PM; Pocket 07-075-TF-Dec. 516

FUNDS AVAILABILITY IS LIMITED. SUBMISSION OF APPLICATION DOESN'T GUARANTEE REBATE PAYMENT.

SECTION 1. CUSTOMER INFORMATION (please print)

OG&E Account Number:		Customer Email Address:		
Customer Name (exactly as shown on OG&E electric bill):		Customer Daytime Phone:		
Service Address:				
City:	State: AR	ZIP Code:	County:	
Mailing Address (if different from installation address):		City:	State:	ZIP Code:

SECTION 2. ALTERNATE REBATE RECIPIENT (please print)

Name:	Daytime Phone:		
Mailing Address:	City:	State:	ZIP Code:

I (Customer Signature) _____ authorize the above party to receive the rebate check.

SECTION 3. INSTALLING CONTRACTOR INFORMATION (please print)

Contractor Name:	Business Name:	Contractor Phone:	
Contractor Address:	City:	State:	ZIP Code:

SECTION 4. DUCT SEALING INFORMATION (to be provided by installing contractor; include invoice)

HVAC Unit 1

1. What date was the project completed? _____
2. What is the central HVAC type? (check one) ☐ A/C with Gas Heat
☐ A/C with Electric Heat ☐ A/C with Heat Pump ☐ Gas Heat (no A/C)
3. What area is served? _____ Unit 1 tonnage: _____
4. Pre CFM: _____ Post CFM: _____

HVAC Unit 2

1. What date was the project completed? _____
2. What is the central HVAC type? (check one) ☐ A/C with Gas Heat
☐ A/C with Electric Heat ☐ A/C with Heat Pump ☐ Gas Heat (no A/C)
3. What area is served? _____ Unit 2 tonnage: _____
4. Pre CFM: _____ Post CFM: _____

SECTION 5. AIR SEALING INFORMATION (to be provided by installing contractor; include invoice)

1. What date was the project completed? _____
2. What is the central HVAC type? (check one) ☐ A/C with Gas Heat ☐ A/C with Electric Heat ☐ A/C with Heat Pump ☐ Gas Heat (no A/C)
3. Square footage of home: _____ Number of stories: _____ Number of bedrooms: _____
4. Shielding (check one): ☐ Well ☐ Normal ☐ Exposed ☐ MVR (see chart on reverse side): _____
5. Pre CFM: _____ (cannot exceed cap; see reverse side) Post CFM: _____

REQUIRED SIGNATURES

Rebate amount: See chart on reverse side.

I hereby certify that the information listed above is accurate and true. I understand the information submitted is subject to audit and onsite verification may be required prior to payment of rebate. The verification inspection is for record purposes only and does not guarantee the quality of the work performed. I also understand that submission of the rebate application does not guarantee a rebate. The program will end when funds are depleted. I understand that all the guidelines have been followed (see Rebate Rules and Guidelines). I also understand that Oklahoma Gas and Electric Company is not liable for any work performed. REBATE APPLICATION AND INVOICE MUST BE SUBMITTED WITHIN 30 DAYS OF INSTALLATION DATE. Contractor and homeowner signatures are required. Make a copy of all receipts and documentation for your records before submitting for rebate.

Installing Contractor: _____
(Signature)

Date: _____

Homeowner: _____
(Signature)

Date: _____

Please return completed rebate form and contractor invoice by email or mail to:

Email: residential.ar@oge.com | **Mail:** OG&E AR Residential Rebates, 3600 Old Greenwood Road, Ste. 1, Fort Smith, AR 72903

FOR REBATE OFFICIAL USE ONLY. DO NOT WRITE IN THIS AREA.

DATE INSTALLED _____ DATE RECEIVED _____ REBATE AMOUNT _____ PROCESSED BY _____

REBATE DETAILS

- Rebate applies only to OG&E Arkansas customers with an active residential account.
- Rebates are shown in chart at right.
- Rebate will not exceed contractor invoice amount.
- Rebates are issued in the form of checks, not utility bill credits.
- Only one (1) rebate request per service address.
- Rebate Application and Invoice must be received within 30 days of completion of installation.
- OG&E is not responsible for inaccurate information.
- Funding for this program is limited to funds availability.

Measure	Leakage reduction	Rebate
Air Sealing	≥15%	\$100
	≥30%	\$150
Duct Sealing	≥25–50%	\$225
	>50–75%	\$275
	>75%	\$300

REBATE APPLICATION DETAILS

Qualifying duct and air sealing must have an invoice dated between January 1 and December 1 of the program year. Completed rebate application and invoice must be submitted no later than 30 days after the insulation installation.

A valid invoice includes the installation date, services purchased, duct and air sealing, price and payment made in full. The duct and air sealing invoice must also specify all required information, including the customer's name, address of installation, phone number, contractor name, business name, address and phone number. All information on the invoice must match the information on the rebate application or the application will not be processed. **Failure to complete all information may result in denial of rebate.**

DO NOT INCLUDE REBATE APPLICATION WITH YOUR OG&E ELECTRIC BILL.

OG&E reserves the right to inspect installations before issuing a rebate. OG&E reserves the right to conduct random inspections to verify installation of the rebated services or equipment at the installation address listed on the form. If the residence does not have the qualifying material or work installed, the homeowner may be required to pay back the rebate and the contractor will be deemed ineligible to offer rebates to future customers. OG&E reserves the right to amend or suspend this program without notice.

LIMITATIONS OF LIABILITY; INDEMNIFICATION

In no way shall Oklahoma Gas and Electric Company be liable for, and Customer hereby agrees to indemnify, defend and hold harmless Oklahoma Gas and Electric Company, its subsidiaries or affiliates, and their respective employees, Officers and directors, from and against any and all liability, loss, damage, cost or expense, including attorney's fees, that may be caused by, due to, occasioned by, or otherwise arising out of the installation, operation, mis-operation, or use of customer's installed materials and installations.

Customer acknowledges and agrees that in no event shall any statement, representation, or lack thereof, either express or implied, by Oklahoma Gas and Electric Company relieve the customer of exclusive responsibility for the Customer's systems. Specifically, Oklahoma Gas and Electric Company approval of the rebate application, payment of the rebate, or any Oklahoma Gas and Electric Company inspection of the qualifying materials and installations shall not be construed as confirming or endorsing the materials or installation or its operating or maintenance procedures nor as a warranty or guarantee as to the safety, reliability, or durability of the materials or installation.

Oklahoma Gas and Electric Company is not responsible for items lost or delayed in the mail, or any rebate delayed due to incomplete or incorrect information on the rebate application and/or Invoice.

Oklahoma Gas and Electric Company is not responsible for any taxes that may be imposed as a result of your receipt of any rebate.

QUALIFYING CUSTOMERS

- This program is available only to OG&E Arkansas customers who own or rent a permanent foundation single family home.
- Multi-family structures qualify for this rebate, however participation must be approved by the program prior to installation.
- Program is available only to retrofit (existing) homes built with electric air conditioning.
- Program excludes new home residential construction, garages, sheds, workshops, basements and doors.

QUALIFYING INSTALLATION

- An approved, Building Performance Institute (BPI) certified program contractor must complete duct and air sealing installation using proper diagnostic techniques and equipment, including Duct Blaster and Blower Door.
- Duct Sealing testing must be completed using the leakage to outside methodology.
- Existing duct leakage conditions must be greater than or equal to 80 CFM25, but less than 40 percent total fan flow (HVAC tonnage x 400 CFM).
- Duct leakage must be reduced by 25 percent or greater in order to qualify for a rebate.
- Existing home leakage cannot exceed the pre-retrofit infiltration cap shown in table below.
- Air sealing installations must comply with the prevailing Arkansas mechanical code, which establishes a minimum ventilation rate (MVR) as shown in chart below.
- Air sealing leakage must be reduced by 15 percent or greater to qualify for a rebate.

Pre-Retrofit Infiltration Cap (x sq. ft.)			
Shielding Type	1 Story	2 Story	3 Story
Well Shielded	11	8.8	7.7
Normal Shielding	9.1	7.3	6.4
Exposed Shielding	8.2	6.6	5.7

MVR Multiplier (x sq. ft.)			
Shielding Type	1 Story	2 Story	3 Story
Well Shielded	1.28	1.02	0.9
Normal Shielding	1.07	0.85	0.75
Exposed Shielding	0.96	0.77	0.67

WHERE TO SUBMIT REBATE APPLICATION AND INVOICE

Please return completed rebate form and contractor invoice by email:
residential.ar@oge.com
or mail to: OG&E AR Residential Rebates
3600 Old Greenwood Road, Ste 1, Fort Smith, AR 72903

Please allow 6–8 weeks after receipt of all documents for the rebate to be processed. Make a copy of all receipts and documentation for your records before submitting for rebate. If you have any questions about your rebate, please call us toll-free at 844-413-3065 or email residential.ar@oge.com.



ATTIC AND WALL INSULATION REBATE

ARKANSAS

APSC FILED Time: 4/29/2026 4:01:07 PM; Recvd: 4/29/2026 3:58:54 PM; Docket 07-075-TF-Doc. 516

FUNDS AVAILABILITY IS LIMITED. SUBMISSION OF APPLICATION DOESN'T GUARANTEE REBATE PAYMENT.

SECTION 1. CUSTOMER INFORMATION (please print)

OG&E Account Number:		Customer Email Address:			
Customer Name (exactly as shown on OG&E electric bill):		Customer Daytime Phone:			
Service Address:					
City:	State: AR	ZIP Code:	County:		
Mailing Address (if different from installation address):		City:	State:	ZIP Code:	

SECTION 2. ALTERNATE REBATE RECIPIENT (please print)

Name:		Daytime Phone:			
Mailing Address:		City:	State:	ZIP Code:	

I (Customer Signature) _____ authorize the above party to receive the rebate check.

SECTION 3. INSTALLING CONTRACTOR INFORMATION (please print)

Contractor Name:		Business Name:		Contractor Phone:	
Contractor Address:		City:	State:	ZIP Code:	

SECTION 4. ATTIC INSULATION INFORMATION (to be provided by installing contractor; include invoice)

1. What date was the project completed? _____
2. What is the central HVAC type? (check one) ☐ A/C with Gas Heat ☐ A/C with Electric Heat ☐ A/C with Heat Pump ☐ Gas Heat (no A/C)
3. What was the existing insulation type? _____ Existing R-value: _____ Existing inches: _____
4. Square feet being insulated: _____ **Must be area over conditioned living space excluding area over garages, barns or sheds**
5. Installed insulation type: _____ Installed R-value: _____ Installed inches: _____ Final R-value: _____

SECTION 5. WALL INSULATION INFORMATION (to be provided by installing contractor; include invoice)

1. What date was the project completed? _____
2. What is the central HVAC type? (check one) ☐ A/C with Gas Heat ☐ A/C with Electric Heat ☐ A/C with Heat Pump ☐ Gas Heat (no A/C)
3. Square feet being insulated: _____ **Must be no existing insulation in walls.**
4. Installed insulation type: _____ Installed R-value: _____

REQUIRED SIGNATURES

Rebate amount: Attic Insulation – \$0.15/square foot, Wall Insulation – \$0.50/square foot

I hereby certify that the information listed above is accurate and true. I understand the information submitted is subject to audit and onsite verification may be required prior to payment of rebate. The verification inspection is for record purposes only and does not guarantee the quality of the work performed. **I also understand that submission of the rebate application does not guarantee a rebate. The program will end when funds are depleted. I understand that all the guidelines have been followed (see Rebate Rules and Guidelines).** I also understand that Oklahoma Gas and Electric Company is not liable for any work performed. REBATE APPLICATION AND INVOICE MUST BE SUBMITTED WITHIN 30 DAYS OF INSTALLATION DATE. Contractor and homeowner signatures are required. Make a copy of all receipts and documentation for your records before submitting for rebate.

Installing Contractor: _____
(Signature)

Homeowner: _____
(Signature)

Date: _____

Date: _____

Please return completed rebate form and contractor invoice by email or mail to:

Email: residential.ar@oge.com | **Mail:** OG&E AR Residential Rebates, 3600 Old Greenwood Road, Ste. 1, Fort Smith, AR 72903

FOR REBATE OFFICIAL USE ONLY. DO NOT WRITE IN THIS AREA.

DATE INSTALLED _____ DATE RECEIVED _____ REBATE AMOUNT _____ PROCESSED BY _____

ARKANSAS

UPGRADE YOUR COMFORT

\$50 REBATE ON ENERGY STAR® CERTIFIED SMART THERMOSTATS

CUSTOMER INFORMATION (please print)

OG&E Account #:

Installation Address:

City:

State:

ZIP:

Customer Name (as shown exactly on your OG&E electric bill):

Customer Address:

City:

State:

ZIP:

Daytime Phone:

Email:

ALTERNATE REBATE RECIPIENT

Name:

Daytime Phone:

Address:

City:

State:

ZIP:

(OG&E customer signature) _____ authorizes the above party to receive the rebate check.



Purchase an ENERGY STAR certified smart thermostat to qualify for this rebate. Available to OG&E residential customers only, limit three per account number. Rebate form must be submitted within 45 days of purchase. This program has limited funding. Rebates are paid on a first-come, first-served basis.

BUILDING INFORMATION

Existing Thermostat (check one): ☐ Programmable (properly programmed) ☐ Non-ProgrammableHome Type (check one): ☐ Single ☐ Duplex ☐ Triplex ☐ FourplexOccupancy Type: ☐ Own ☐ RentHVAC Type (check one): ☐ Heat Pump ☐ Gas ☐ Electric Resistance

Size of Area To Be Cooled (sq. ft.):

SMART THERMOSTAT INFORMATION

Manufacturer/Brand:

Model #:

Installation Date:

Installation Cost:

FUND AVAILABILITY IS LIMITED. SUBMISSION OF APPLICATION DOES NOT GUARANTEE REBATE PAYMENT. By signing below, the purchaser authorizes OG&E to perform on-site inspections as needed to confirm installation. Purchaser confirms they are an OG&E customer and all information on this application is accurate. A separate rebate application must be filled out for each unit purchased. Rebate checks will be paid to the purchaser listed on this form.

Purchaser's Signature:

Date:

Please return completed rebate form and dated sales receipt by email or mail to: residential.ar@oge.com or
OG&E AR Residential Rebates, 3600 Old Greenwood Road, Ste. 1, Fort Smith, AR 72903

Questions: 844-413-3065, Option 4, 8 a.m.-5 p.m. CST

OG&E**We Energize Life**

OGE.com

SMART THERMOSTAT RULES AND GUIDELINES

ARKANSAS

REBATE DETAILS

- Rebate applies only to new ENERGY STAR® certified smart thermostats purchased between January 1 and October 31 of the current program year.
- Rebates are limited to three (3) smart thermostats per account number.
- Rebates must not exceed the cost of thermostat.
- Rebates are issued in the form of checks, not utility bill credits.
- Rebate checks will be paid to the purchaser listed on the rebate application.
- OG&E is not responsible for inaccurate information.
- Funding for this program is limited to fund availability. SUBMISSION OF APPLICATION DOES NOT GUARANTEE REBATE PAYMENT. Rebates are paid on a first-come, first-served basis. Rebate form and receipt must be postmarked by October 31, of the current program year. This rebate program may be amended or suspended at any time.

QUALIFYING DOCUMENTATION

- Copy of the qualifying NEW Smart Thermostat receipt which shows the purchase date, price and store name.
- Completed and Signed Smart Thermostat rebate form.
- A separate rebate application must be completed for each new smart thermostat model purchased.
- Rebate form and receipt must be postmarked by by October 31 of the current program year. A valid invoice must include the product purchased, quantity purchased, price and payment made in full. Void payment checks do not qualify as proof of payment. Failure to complete all information will result in denial of rebate.

DO NOT INCLUDE REBATE APPLICATION WITH YOUR OG&E ELECTRIC BILL

QUALIFYING CUSTOMERS

Available to OG&E residential customers only. OG&E account must be current and active.

QUALIFYING INSTALLATION

By signing the rebate application, the purchaser authorizes OG&E to perform on-site inspections as needed to confirm installation.

WHERE TO SUBMIT REBATE APPLICATION AND SUPPORTING DOCUMENTATION

Please return the completed rebate form with the dated sales receipt.

by email:

residential.ar@oge.com

or by mail:

OG&E AR Residential Rebates
3600 Old Greenwood Road, Ste 1
Fort Smith, AR 72903

Please allow 6-8 weeks after receipt of all documents for the rebate to be processed. Make a copy of all receipts and documentation for your records before submitting the rebate. If you have any questions about your rebate, please call us toll-free at **844-413-3065** or email **residential.ar@oge.com**.



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HVAC REPLACEMENT REBATE

ARKANSAS

APSC FILED TIME: 4/29/2020 4:01:07 PM, Rev'd: 4/29/2020 3:58:54 PM, Pocket 07-075-TF-Dec. 516

FUNDS AVAILABILITY IS LIMITED. SUBMISSION OF APPLICATION DOESN'T GUARANTEE REBATE PAYMENT.

SECTION 1. CUSTOMER INFORMATION (please print)

OG&E Account Number:		Customer Email Address:		
Customer Name (exactly as shown on OG&E electric bill):		Customer Daytime Phone:		
Service Address:				
City:	State: AR	ZIP Code:	County:	
Mailing Address (if different from installation address):		City:	State:	ZIP Code:

SECTION 2. ALTERNATE REBATE RECIPIENT (please print)

Name:	Daytime Phone:		
Mailing Address:	City:	State:	ZIP Code:

I (Customer Signature) _____ authorize the above party to receive the rebate check.

SECTION 3. INSTALLING CONTRACTOR INFORMATION (please print)

Contractor Name:	Business Name:	Contractor Phone:	
Contractor Address:	City:	State:	ZIP Code:

SECTION 4. HVAC INFORMATION (to be provided by installing contractor; include invoice and AHRI documentation)

HVAC Unit 1

1. What date was the project completed? _____
2. What is the home type? (check one) ☐ **Single Family** ☐ **Duplex**
3. HVAC unit installed? (check one) ☐ **Heat Pump** ☐ **Central A/C**
4. Evaporator model #: _____
5. Condenser model #: _____
6. Manufacturer: _____ AHRI #: _____
7. A/C cooling capacity: _____ Heat pump heating capacity: _____
8. EER: _____ SEER: _____ HSPF: _____ **Tonnage:** _____

Rebate Amount: 17 SEER (16.2 SEER2 or greater) - \$100/ton

18 SEER - \$120/ton 19 SEER - \$200/ton

HVAC Unit 2

1. What date was the project completed? _____
2. What is the home type? (check one) ☐ **Single Family** ☐ **Duplex**
3. HVAC unit installed? (check one) ☐ **Heat Pump** ☐ **Central A/C**
4. Evaporator model #: _____
5. Condenser model #: _____
6. Manufacturer: _____ AHRI #: _____
7. A/C cooling capacity: _____ Heat pump heating capacity: _____
8. EER: _____ SEER: _____ HSPF: _____ **Tonnage:** _____

Rebate Amount: 17 SEER (16.2 SEER2 or greater) - \$100/ton

18 SEER - \$120/ton 19 SEER - \$200/ton

REQUIRED SIGNATURES

I hereby certify that the information listed above is accurate and true. I understand the information submitted is subject to audit and onsite verification may be required prior to payment of rebate. The verification inspection is for record purposes only and does not guarantee the quality of the work performed. I also understand that submission of the rebate application does not guarantee a rebate. The program will end when funds are depleted. I understand that all the guidelines have been followed (see Rebate Rules and Guidelines). I also understand that Oklahoma Gas and Electric Company is not liable for any work performed. REBATE APPLICATION, INVOICE AND DOCUMENTATION MUST BE SUBMITTED WITHIN 30 DAYS OF INSTALLATION DATE. If application is incomplete, rebate will be denied. Contractor and homeowner signatures are required. Make a copy of all receipts and documentation for your records before submitting for rebate.

Installing Contractor: _____
(Signature)

Date: _____

Homeowner: _____
(Signature)

Date: _____

Please return completed rebate form and contractor documentation by email or mail to:

Email: residential.ar@oge.com | **Mail:** OG&E AR Residential Rebates, 3600 Old Greenwood Road, Ste 1, Fort Smith, AR 72903

FOR REBATE OFFICIAL USE ONLY. DO NOT WRITE IN THIS AREA.

DATE INSTALLED _____ DATE RECEIVED _____ REBATE AMOUNT _____ PROCESSED BY _____

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POOL PUMP REPLACEMENT REBATE

ARKANSAS

APSC FILED Time: 4/29/2026 4:01:47 PM Rec'd: 4/29/2026 3:58:54 PM Docket 07-075-TF-Doc. 516

FUNDS AVAILABILITY IS LIMITED. SUBMISSION OF APPLICATION DOESN'T GUARANTEE REBATE PAYMENT.

SECTION 1. Customer Information (please print)

OG&E Account Number:		Customer Email Address:		
Customer Name (exactly as shown on OG&E electric bill):		Customer Daytime Phone:		
Service Address:				
City:	State: AR	ZIP Code:	County:	
Mailing Address (if different from installation address):		City:	State:	ZIP Code:

SECTION 2. Alternate Rebate Recipient (please print)

Name:	Daytime Phone:		
Mailing Address:	City:	State:	ZIP Code:

I (Customer Signature) _____ **authorize the above party to receive the rebate check.**

SECTION 3. Installing Contractor Information (please print)

Contractor Name:	Business Name:	Contractor Phone:	
Contractor Address:	City:	State:	ZIP Code:

SECTION 4. Pool Pump Information (to be provided by installing contractor)

1. Is it an ENERGY STAR® certified pool pump? (check one) ☐ **Yes** ☐ **No** 2. Manufacturer: _____
3. Model/Product #: _____ 4. How much horsepower? _____
5. What is the pump type? (check one) ☐ **Multi-speed** ☐ **Variable-speed** 6. Old pump manufacturer: _____
7. Old pump model/product #: _____ 8. Old pump horsepower: _____

Rebate amount is up to \$300 toward the purchase of an ENERGY STAR certified multi-speed (at least 1 horsepower) or variable-speed (0.5 horsepower or higher) pool pump.

REQUIRED SIGNATURES

I hereby certify that the information listed above is accurate and true. I understand the information submitted is subject to audit and onsite verification may be required prior to payment of rebate. The verification inspection is for record purposes only and does not guarantee the quality of the work performed. **I also understand that submission of the rebate application does not guarantee a rebate. The program will end when funds are depleted. I understand that all the guidelines have been followed (see Rebate Rules and Guidelines).** I also understand that Oklahoma Gas and Electric Company is not liable for any work performed. REBATE APPLICATION AND INVOICE MUST BE SUBMITTED WITHIN 30 DAYS OF INSTALLATION DATE. Contractor and homeowner signatures are required. Make a copy of all receipts and documentation for your records before submitting for rebate.

Installing Contractor: _____ **Homeowner:** _____
(Signature) (Signature)

Date: _____ **Date:** _____

Please return completed rebate form and contractor invoice by email or mail to:

Email: residential.ar@oge.com | Mail: OG&E AR Residential Rebates, 3600 Old Greenwood Road, Ste. 1, Fort Smith, AR 72903

FOR REBATE OFFICIAL USE ONLY. DO NOT WRITE IN THIS AREA.

DATE INSTALLED _____ DATE RECEIVED _____ REBATE AMOUNT _____ PROCESSED BY _____

- Rebate applies only to the installation of a qualifying ENERGY STAR® pool pump.
- Rebates are limited to the amount listed in section 4 of this document.
- Rebate will not exceed contractor invoice amount.
- Rebates are issued in the form of checks, not utility bill credits.
- Rebate Application and Invoice must be received within 30 days of new pump installation.
- OG&E is not responsible for inaccurate information.
- Funding for this program is limited to funds availability.

Qualifying pool pump replacement invoice must be dated between January 1 and December 1 of the program year. A valid invoice includes the installation date, products purchased, quantity purchased, price and payment made in full. The pool pump replacement invoice must also specify all required information, including the customer name, address of installation, phone number, contractor name, business name, address and phone number. All information on the invoice must match the information on the rebate application or the application will not be processed. **Failure to complete all information may result in denial of rebate.**

OG&E reserves the right to inspect installations before issuing a rebate. OG&E reserves the right to conduct random inspections to verify installation of the rebated equipment at the installation address listed on the form. If the residence does not have the qualifying material or work installed, the homeowner may be required to pay back the rebate and the contractor will be deemed ineligible to offer rebates to future customers. OG&E reserves the right to amend or suspend this program without notice.

In no way shall Oklahoma Gas and Electric Company be liable for, and Customer hereby agrees to indemnify, defend and hold harmless Oklahoma Gas and Electric Company, its subsidiaries or affiliates, and their respective employees, Officers and directors, from and against any and all liability, loss, damage, cost or expense, including attorney's fees, that may be caused by, due to, occasioned by, or otherwise arising out of the installation, operation, mis-operation, or use of customer's installed materials and installations.

Customer acknowledges and agrees that in no event shall any statement, representation, or lack thereof, either express or implied, by Oklahoma Gas and Electric Company relieve the customer of exclusive responsibility for the Customer's systems. Specifically, Oklahoma Gas and Electric Company approval of the rebate application, payment of the rebate, or any Oklahoma Gas and Electric Company inspection of the qualifying materials and installations shall not be construed as confirming or endorsing the materials or installation or its operating or maintenance procedures nor as a warranty or guarantee as to the safety, reliability, or durability of the materials or installation.

Oklahoma Gas and Electric Company is not responsible for items lost or delayed in the mail, or any rebate delayed due to incomplete or incorrect information on the rebate application and/or invoice.

Oklahoma Gas and Electric Company is not responsible for any taxes that may be imposed as a result of your receipt of any rebate.

This program is available only to OG&E Arkansas residential customers who are replacing an existing pool pump. New pool installations do not qualify for this rebate. Multi-family structures do not qualify for this rebate.

All pool pumps must be installed by a professional installation company, to the manufacturer's specifications and meet all state and local codes and federal regulations. Pool pumps must meet qualifying type and horsepower as listed under section 4.

Please return completed rebate form and contractor invoice by email:

residential.ar@oge.com

or mail to:

OG&E AR Residential Rebates
3600 Old Greenwood Road, Ste 1
Fort Smith, AR 72903

Please allow 4 to 6 weeks after receipt of all documents for the rebate to be processed. Make a copy of all receipts and documentation for your records before submitting for rebate. If you have any questions about your rebate, please call us toll-free at **844-413-3065** or email **residential.ar@oge.com**.



WINDOW REPLACEMENT REBATE

ARKANSAS

APSC FILED Time: 4/29/2025 4:01:07 PM; Record: 42872026 3:58:54 PM; Pocket 07-075-TF-Dec. 516

FUNDS AVAILABILITY IS LIMITED. SUBMISSION OF APPLICATION DOESN'T GUARANTEE REBATE PAYMENT.

SECTION 1. Customer Information (please print)

OG&E Account Number:		Customer Email Address:			
Customer Name (exactly as shown on OG&E electric bill):		Customer Daytime Phone:			
Service Address:					
City:	State: AR	ZIP Code:	County:		
Mailing Address (if different from installation address):		City:	State:	ZIP Code:	

SECTION 2. Alternate Rebate Recipient (please print)

Name:		Daytime Phone:			
Mailing Address:		City:	State:	ZIP Code:	

I (Customer Signature) _____ **authorize the above party to receive the rebate check.**

SECTION 3. Installing Contractor Information (please print)

Contractor Name:		Business Name:		Contractor Phone:	
Contractor Address:		City:	State:	ZIP Code:	

SECTION 4. Window Information (to be provided by installing contractor; include invoice and NFRC documentation)

- What date was the project completed? _____
- What is the total square footage of the new windows installed? _____
- What is the central HVAC type? (check one) ☐ **Electric A/C with Gas Heat** ☐ **Electric A/C with Resistance Heat**
☐ **Gas Heat Only (no A/C) Heat Pump** ☐ **Air Source Heat Pump**
- Is the window ENERGY STAR® rated? (check one) ☐ **Yes** ☐ **No**
- How many panes does the existing window have? (check one) ☐ **Single Pane** ☐ **Double Pane**
- What is the U-factor rating of the new window? _____
- What is the SHGC rating of the new window? _____
- How many ENERGY STAR rated windows were installed (limit **seven** per home)? _ **Rebate Amount: \$50 per window; maximum \$350 total.**

REQUIRED SIGNATURES

I hereby certify that the information listed above is accurate and true. I understand the information submitted is subject to audit and onsite verification may be required prior to payment of rebate. The verification inspection is for record purposes only and does not guarantee the quality of the work performed. **I also understand that submission of the rebate application does not guarantee a rebate. The program will end when funds are depleted. I understand that all the guidelines have been followed (see Rebate Rules and Guidelines).** I also understand that Oklahoma Gas and Electric Company is not liable for any work performed. REBATE APPLICATION AND INVOICE MUST BE SUBMITTED WITHIN 30 DAYS OF INSTALLATION DATE. Contractor and homeowner signatures are required. Make a copy of all receipts and documentation for your records before submitting for rebate.

Installing Contractor: _____ **Homeowner:** _____
(Signature) (Signature)

Date: _____ **Date:** _____

Please return completed rebate form and contractor invoice by email or mail to:

Email: residential.ar@oge.com | Mail: OG&E AR Residential Rebates, 3600 Old Greenwood Road, Ste. 1, Fort Smith, AR 72903

FOR REBATE OFFICIAL USE ONLY. DO NOT WRITE IN THIS AREA.

DATE INSTALLED _____ DATE RECEIVED _____ REBATE AMOUNT _____ PROCESSED BY _____

- Rebate applies only to OG&E customers with an active Arkansas residential account.
- Rebates are limited to seven (7) windows per home, up to \$350 total rebate.
- Rebate will not exceed contractor invoice amount.
- Rebates are issued in the form of checks, not utility bill credits.
- Only one (1) rebate request per service address.
- Rebate Application, Invoice and Documentation for all windows showing U-factor, SHGC and Measurements (in inches) must be received within 30 days of completion of job.
- OG&E is not responsible for inaccurate information.
- Funding for this program is limited to funds availability.

Qualifying window replacement must have an invoice dated between January 1 and December 1 of the current program year. Completed rebate application, invoice and documentation showing U-factor, SHGC and Measurements (in inches) must be submitted no later than 30 days after window installation.

A valid invoice includes the installation date, products purchased, quantity purchased, price and payment made in full. The window replacement invoice must also specify all required information, including the customer name, address of installation, phone number, contractor name, business name, address and phone number. All information on the invoice must match the information on the rebate application or the application will not be processed. **Failure to complete all information will result in denial of rebate.**

OG&E reserves the right to inspect installations before issuing a rebate. OG&E reserves the right to conduct random inspections to verify installation of the rebated equipment at the installation address listed on the form. If the residence does not have the qualifying material or work installed, the homeowner may be required to pay back the rebate and the contractor will be deemed ineligible to offer rebates to future customers. OG&E reserves the right to amend or suspend this program without notice.

In no way shall Oklahoma Gas and Electric Company be liable for, and Customer hereby agrees to indemnify, defend and hold harmless Oklahoma Gas and Electric Company, its subsidiaries or affiliates, and their respective employees, Officers and directors, from and against any and all liability, loss, damage, cost or expense, including attorney's fees, that may be caused by, due to, occasioned by, or otherwise arising out of the installation, operation, mis-operation, or use of customer's installed materials and installations.

Customer acknowledges and agrees that in no event shall any statement, representation, or lack thereof, either express or implied, by Oklahoma Gas and Electric Company, relieve the customer of exclusive responsibility for the Customer's systems. Specifically, Oklahoma Gas and Electric Company approval of the rebate application, payment of the rebate, or any Oklahoma Gas and Electric Company inspection of the qualifying materials and installations shall not be construed as confirming or endorsing the materials or installation or its operating or maintenance procedures nor as a warranty or guarantee as to the safety, reliability, or durability of the materials or installation.

Oklahoma Gas and Electric Company is not responsible for items lost or delayed in the mail, or any rebate delayed due to incomplete or incorrect information on the rebate application and/or invoice.

Oklahoma Gas and Electric Company is not responsible for any taxes that may be imposed as a result of your receipt of any rebate.

- This program is available only to OG&E residential customers in Arkansas who own a permanent foundation, single family home.
- Multi-family structures do not qualify for this rebate.
- Program is available only to retrofit (existing) homes with electric central air conditioning.
- Program excludes new home residential construction, garages, sheds, workshops, basements and doors.

All windows must be installed by a professional window company. All rebate forms need to have a copy of the invoice and detailed specifications for the windows installed.

Please return completed rebate form and contractor invoice by email:

residential.ar@oge.com

or mail to:

OG&E AR Residential Rebates
3600 Old Greenwood Road, Ste 1
Fort Smith, AR 72903

Please allow 6 to 8 weeks after receipt of all documents for the rebate to be processed. Make a copy of all receipts and documentation for your records before submitting for rebate. If you have any questions about your rebate, please call us toll-free at **844-413-3065** or email **residential.ar@oge.com**.



SPECIAL PRICING



On select ENERGY STAR®
certified products.



Looking for more
energy efficiency
offerings? **Scan
for savings.**

Brought to you by

OG+E®

We Energize Life



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SPECIAL PRICING





GET A
\$50 REBATE

on new ENERGY STAR® certified smart thermostats.

YOUR INFORMATION (please print)

Customer Name (as shown exactly on your OG&E electric bill):

OG&E Account #:

Service Address:

City:	State:	ZIP Code:
Phone:	Email:	
Mailing Address:		
City:	State:	ZIP Code:
Signature:		Date:



Complete this form online.
Scan to start your rebate today.

GET A \$50 REBATE

on new ENERGY STAR® certified smart thermostats.

Here's How:

1. Purchase a new ENERGY STAR certified smart thermostat between January 1, 2025, and October 31, 2025.
2. Complete and sign the rebate form.
3. Send the completed form and a **copy of the receipt** for the qualifying NEW thermostat that shows the purchase date, price and store name to:
Email: residential.ar@oge.com
Mail: OG&E AR Residential Rebates
3600 Old Greenwood Road, STE 1
Fort Smith, AR 72903



Purchase a NEW ENERGY STAR certified smart thermostat to qualify for this rebate. Available to OG&E residential customers only, limit three (3) per account number. Rebate form and receipt must be postmarked by October 31, 2025. This program has limited funding. Rebates are paid on a first-come, first-served basis.

Brought to you by

OG&E **We Energize Life**

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Together, we can reach our energy savings goal!

PARTNER
LOGO

Our school has enrolled in OG&E's Strategic Energy Management (SEM) program with the goal of reducing our energy waste and costs.

Here's how you can help:



Unplug/turn off electronic devices (lamps, fans, mini fridges, space heaters, etc.) when not in use.



Turn off the lights when you leave the room.



Report any door or window gaps to maintenance.



Close the blinds to keep the room cooler and insulate the window.



Use fans to help you stay cooler and circulate the air.



We Energize Life
ENERGIZE LIFE

Together, we can reach our energy savings goal!

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Close the blinds to keep the room cooler and insulate the window.



Use fans to help you stay cooler and circulate the air.



We Energize Life

Program Overview

Oklahoma Gas and Electric (OG&E, Sponsor) offers a variety of energy efficiency opportunities for our commercial, industrial and public sector customers. The Business Energy Efficiency Program, administered by CLEAResult, offers expert technical assistance, consulting services and generous financial incentives to help you achieve your long-term energy goals. The Program is offered on a first-come, first-served basis from January 1, 2025, through December 31, 2025, while funding lasts.

Customer Participation Agreement

Customer confirms that it is an existing commercial, public sector or industrial entity that receives electric distribution services from Sponsor. Customer agrees to provide full and accurate usage data and other information upon request. Customer also agrees to provide access to CLEAResult and Sponsor. This participation agreement reflects the voluntary collaboration between your organization and the OG&E-sponsored programs. The terms attached detail the general commitments of the participant in order to improve the energy efficiency of their facilities. Applicable program manuals with additional terms will be available for the participant once the program administrator has selected the appropriate program options for a specific participant.

Steps to participate:

1. Sign and submit the participation agreement along with payee's W-9 to BusinessEE@oge.com or your local CLEAResult contact.
2. You will receive a summary report of findings at your facility, including energy-saving opportunities and potential savings.
3. For some offerings, you will sign and submit a project application to define projects to be completed and reserve incentive funds.
4. Complete projects defined in the project application.
5. Notify program administrator of project completion and schedule post-inspection if required.
6. Receive your incentives from OG&E and look forward to future years of energy savings.
7. After completing the project and receiving incentives, you may be contacted by an independent evaluator to verify information gathered by the Program and/or to review on-site equipment installation.

BY ENDORSING BELOW, YOUR ORGANIZATION ACCEPTS THIS AGREEMENT WITH OG&E

This agreement should be signed by your organization's director, president or similar executive and is valid through the 2025 program year. If participant wishes to end their participation in the Program, they may do so at any time by providing the program administrator written notice of their intentions.

CUSTOMER INFORMATION

Customer Account Name:		Customer Contact Name:	
Address:			
City:	State:	ZIP Code:	
Email:	Office Phone:	Mobile Phone:	
Additional Information If Applicable:			
Site Name:			
OG&E Account Number:*			
<i>*If you have more than one account number, please provide a separate list of buildings, physical addresses and account numbers.</i>			
Type of Project:		Expected Construction Completion Date:	

INCENTIVE CHECK INFORMATION

Pay to the Order Of:		Payee Tax ID: (Return With Current W-9 Form)	
Incentive Payment Mailing Address (No P.O. Boxes):		City:	State: ZIP Code:
Payee Contact Name:	Payee Email:	Payee Phone:	

CUSTOMER AGREED AND ACCEPTED

I have read and understood the Customer Participation Agreement and the attached Standard Terms and Conditions for Participating Customers and certify that the information I have provided is true and correct.

Signature:	Date:
Name (Printed):	Title:

CLEAResult®		Date: April 7, 2025 11:37 AM
File Name: 0325_OGEAR_CM_5282681_Participation_Agreement_FRM		Additional Details:
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Color (i.e. 4cp/0, 4cp/4cp, black/0, black/black): 4C	Other (spot colors, etc):	
MAM: Tara P.	Producer: Kaitlyn S.	

CLEAResult AGREED AND ACCEPTED

Signature:

Date:

Name (Printed):

Title:

STANDARD TERMS AND CONDITIONS FOR PARTICIPATING CUSTOMERS

These Standard Terms and Conditions for Participating Customers and the Customer Participation Agreement (collectively, the **"Agreement"**) are made and entered into by and between CLEAResult Consulting Inc., a Texas corporation and/or an affiliate thereof ("CLEAResult"), and Customer for the purpose of evaluating and installing energy-efficient measures ("**EEM**") under the Program funded by Sponsor. CLEAResult and Customer may be referred to in this Agreement individually as a "Party" and collectively as the "Parties." The Parties acknowledge and agree that the state regulatory governing body (the "**PUC**"), Sponsor and third-party evaluators acting under the direction of Sponsor are third-party beneficiaries of this Agreement. In consideration of the mutual covenants and agreements set forth below, the adequacy and sufficiency of which are hereby acknowledged, the Parties hereby agree as follows:

- 1. ACCESS AND PARTICIPATION.** Customer agrees to support CLEAResult and assign a representative to facilitate services provided under this Agreement. Customer acknowledges its intent to install EEM. Customer agrees to allow CLEAResult to access its facilities, energy use and cost information for the purposes of implementing this Agreement. If Customer is a tenant, Customer represents that by signing this document they have obtained the property owner's permission to install EEM under this Agreement. Customer agrees not to use the name or identifying characteristics of Sponsor or its contractors for any advertising, sales promotion or other publicity of any kind. Customer also confirms that it has not and will not receive rebates, incentives or services for any measures installed under this Program from another program funded by Sponsor. The Program may be modified or terminated without prior notice, and this Agreement is subject to modifications by Sponsor.
- 2. ELIGIBILITY.** Sponsor determines eligibility of Customers at its sole discretion. CLEAResult may request verification of eligibility requirements at any time during the Program period.
- 3. INCENTIVE PAYMENT.** Customer acknowledges that incentives will be paid by Sponsor only if: (a) Customer(s) and installed measure(s) or services meet the Program eligibility requirements and the requirements outlined by the Program; (b) measures are installed in eligible project sites; and (c) measures are installed at a project site that has not received incentives from any other of Sponsor's energy efficiency programs for the same measure(s). Customer understands that Sponsor, in its sole discretion, may withhold incentive payments committed to Customer if a project site is proven ineligible or a project otherwise does not comply with the requirements set forth by the Program. Customer acknowledges that the incentive amount may not exceed the cost of the EEM.
- 4. AUDITING, MONITORING AND VERIFICATION.** Customer also agrees to allow CLEAResult, Sponsor, third-party evaluators acting under the direction of Sponsor, and the PUC to access its facilities for the purpose of confirming Customer's participation in the Program, inspecting installed EEM and verifying the energy savings achieved through the Program. Customer agrees to cooperate with CLEAResult, third-party evaluators, Sponsor and the PUC, as necessary. Customer also agrees to remedy any issue arising from auditing and monitoring results at no additional cost within the timeframe provided by the Program. Customer understands that any incentives may be withheld if Customer refuses to participate in any required verification within a reasonable period. Customer verifies that all EEM is installed in accordance with all applicable federal, state and local laws and manufacturer's specifications.
- 5. CONFIDENTIALITY.** CLEAResult shall keep Customer information confidential. Only Sponsor, the third-party evaluators acting under the direction of Sponsor and the PUC shall be granted access to Customer data as needed or required. CLEAResult will not use the name or identifying characteristics of Customer in advertising sales promotion or other publicity without Customer's written approval.
- 6. NO WARRANTY.** CLEAResult, SPONSOR AND THE PUC MAKE NO REPRESENTATIONS OR WARRANTIES, AND ASSUME NO LIABILITY WITH RESPECT TO QUALITY, SAFETY, PERFORMANCE OR OTHER ASPECT OF ANY EEM INSTALLED PURSUANT TO THIS AGREEMENT AND EXPRESSLY DISCLAIM ANY SUCH REPRESENTATION, WARRANTY OR LIABILITY, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT. NOTHING IN THIS AGREEMENT SHALL BE CONSTRUED TO CREATE ANY DUTY TO, ANY STANDARD OF CARE WITH REFERENCE TO OR ANY LIABILITY TO ANY THIRD PARTY. NEITHER THE PUC, SPONSOR NOR CLEAResult SHALL BE RESPONSIBLE FOR COSTS OR CORRECTIONS OF CONDITIONS ALREADY EXISTING IN THE FACILITIES INSPECTED THAT FAIL TO COMPLY WITH APPLICABLE LAWS AND REGULATIONS.
- 7. INDEMNIFICATION; LIMIT ON LIABILITY.** TO THE EXTENT ALLOWED BY LAW, CUSTOMER AGREES TO INDEMNIFY THE PUC, SPONSOR AND CLEAResult AGAINST ALL LOSS, DAMAGES, COSTS AND LIABILITY ARISING FROM ANY CLAIMS RELATED TO ANY PRODUCTS INSTALLED OR SERVICES PERFORMED DURING THE INSTALLATION OR MAINTENANCE OF EEM. NEITHER THE PUC, SPONSOR, CLEAResult NOR CUSTOMER SHALL BE LIABLE TO EACH OTHER FOR ANY INCIDENTAL, SPECIAL, INDIRECT OR CONSEQUENTIAL DAMAGES RELATED TO THIS AGREEMENT.
- 8. MISCELLANEOUS.** This Agreement shall be governed by and construed under the laws of the State of Arkansas, without regard to conflict of law rules. Customer shall not assign, delegate or subcontract this Agreement or its duties thereunder, in whole or in part, voluntarily or involuntarily (including a transfer to a receiver or bankruptcy estate) without the prior written permission of CLEAResult. CLEAResult may assign its rights and delegate its duties under this Agreement to any third party at any time without Customer's consent. If any provision of this Agreement is invalid or unenforceable in any jurisdiction, the other provisions in this Agreement shall remain in full force and effect in such jurisdiction and shall be liberally construed in order to effectuate the purpose and intent of this Agreement. The invalidity or unenforceability of any provision of this Agreement in any jurisdiction shall not affect the validity or enforceability of any such provision in any other jurisdiction. The failure of either Party to enforce strict performance by the other of any provision of this Agreement, or to exercise any right available to the Party under this Agreement, shall not be construed as a waiver of such Party's right to enforce strict performance in the same or any other instance. Sections 1 and 4 through 7 shall survive the term of this Agreement.

**We Energize Life**

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Other (spot colors, etc):

MAM: Tara P.

Producer: Kaitlyn S.



INCENTIVOS DISPONIBLES

¿Estás planeando un proyecto de eficiencia energética? Participa en el programa. Nuestro Programa de Soluciones para Pequeñas Empresas ofrece incentivos y descuentos que pueden cubrir hasta el 90 del costo de un proyecto o compra calificada.

Tarifas de incentivos:

- \$0.20/kWh reducido para medidas elegibles de iluminación LED y refrigeración
- Reembolsos variables para compras calificadas de iluminación y equipos de cocina

PROYECTOS ELEGIBLES

Los incentivos están disponibles para una amplia variedad de proyectos de eficiencia energética, que incluyen:

- Mejoras en la iluminación LED* (incluidos sensores de ocupación y señales de salida)
- Juntas de puertas de refrigeración y cortinas de tiras
- Equipos de cocina ENERGY STAR® calificados
- Compra de bombillas LED a distribuidores aprobados

*Las actualizaciones de LED deben estar aprobadas por el Consorcio DesignLights®.

Tome el control de su consumo de energía y de sus resultados.

Para comenzar, tenga a mano su número de cuenta de OG&E y la dirección del sitio y contáctenos hoy.
BusinessEE@oge.com
844-413-3065

Los productos y servicios son proporcionados únicamente por proveedores de servicios participantes aprobados. OG&E no vende bienes o servicios en sus programas de eficiencia energética.

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GRANDES AHORROS PARA SU PEQUEÑA EMPRESA

PROGRAMA DE SOLUCIONES PARA PEQUEÑAS EMPRESAS

OG&E ofrece soluciones de eficiencia energética para clientes de pequeñas empresas.

BENEFICIOS DEL PROGRAMA

Le proporcionaremos todo lo que necesita para ayudar a su empresa a lograr ahorros de energía a largo plazo, que incluyen:

- Una evaluación de iluminación sin costo de bolsillo y sin compromiso para identificar oportunidades de ahorro de energía
- Recomendaciones y estimaciones de ahorro de energía, costos de proyectos y períodos de amortización
- Instalación de equipos de ahorro de energía aprobados por un contratista local precalificado
- Incentivos pagados directamente al contratista por el programa para reducir su costo inicial
- Descuentos instantáneos de distribuidores asociados para compras de iluminación y equipos de cocina

Es con programas como este que OG&E puede mantener las tarifas entre las más bajas del país.

ELEGIBILIDAD

El programa está abierto a cualquier pequeño cliente comercial con un medidor de cuenta OG&E válido y una demanda máxima de no más de 250 kW en cualquier instalación.

Comience hoy:

1. Visite **OG&E.com/BusinessEE** para ver los contratistas y distribuidores participantes.
2. Póngase en contacto con el socio del programa que seleccionó y proporcione su número de cuenta de cliente para verificar su elegibilidad.

ESCENARIO TÍPICO DEL PROYECTO

Para darle una idea de los ahorros potenciales disponibles a través del programa, a continuación se muestra un ejemplo de algunas adaptaciones propuestas comúnmente. Los ahorros y costos proyectados para estas modernizaciones están a la derecha.



Iluminación interior existente:

32 luminarias fluorescentes de 4 pies y 4 lámparas
16 bombillas incandescentes de 60W
2 señales de salida

Modernización de la iluminación interior:

32 luminarias LED de 4 pies y 36 W
16 LEDs de 10W
2 señales de salida LED

Los incentivos, los ahorros reales y los períodos de recuperación de la inversión varían según el equipo instalado, las características del edificio, los patrones de uso de energía, la antigüedad del equipo existente, la ubicación y otros parámetros específicos del proyecto.

EJEMPLO DE PROYECTO EN NÚMEROS

20,671 kWh

ahorro total de energía

2.96 kW

ahorro total en la demanda máxima

\$4,548

incentivos estimados

\$505

costo neto para el cliente

\$5,053

costo estimado del proyecto

2.93 años

recuperación de la inversión del proyecto

\$2,067

ahorro anual estimado



AVAILABLE INCENTIVES

Planning an energy efficiency project? Get with the program. Our Small Business Solutions Program offers incentives and rebates that can cover up to 90 percent of the cost of a project or qualified purchase.

Incentive rates:

- \$.20/kWh reduced for eligible LED lighting and refrigeration measures
- Variable rebates for qualified lighting and kitchen equipment purchases

ELIGIBLE PROJECTS

Incentives are available for a wide variety of energy efficiency projects, including:

- LED lighting upgrades* (including occupancy sensors and exit signs)
- Refrigeration door gaskets and strip curtains
- Qualified ENERGY STAR® kitchen equipment
- LED bulb purchases from approved distributors

*LED retrofits must be DesignLights Consortium® approved.

**Take control of your
energy use—and your
bottom line.**

To get started, please have
your OG&E account number
and site address handy and
contact us today.

BusinessEE@oge.com
844-413-3065

Products and services are provided solely by approved
participating Service Providers. OG&E does not sell goods
or services in its energy efficiency programs.

**BIG SAVINGS
FOR YOUR
SMALL BUSINESS**

SMALL BUSINESS SOLUTIONS PROGRAM

OG&E offers energy-efficient solutions
for small business customers.



OG&E®

We Energize Life

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We Energize Life

OG&E.com

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PROGRAM BENEFITS

We'll provide everything you need to help your business achieve long-term energy savings, including:

- A no-out-of-pocket-cost, no-obligation lighting assessment to identify energy-saving opportunities
- Recommendations and estimates for energy savings, project costs and payback periods
- Installation of approved energy-saving equipment by a local, pre-qualified contractor
- Incentives paid directly to the contractor by the program to reduce your upfront cost
- Instant discounts from partnered distributors for lighting and kitchen equipment purchases

It's with programs like this one that OG&E is able to keep rates among the lowest in the country.

ELIGIBILITY

The program is open to any small commercial customers with a valid OG&E account meter and no more than 250 kW peak demand at any one facility.

Get started today:

1. Visit [OGEE.com/BusinessEE](https://www.ogee.com/BusinessEE) to view participating contractors and distributors.
2. Contact the program partner you selected and provide your customer account number to verify your eligibility.

TYPICAL PROJECT SCENARIO

To give you an idea of the potential savings available through the program, below is an example of some commonly proposed retrofits. The projected savings and costs for these retrofits are on the right.



Existing interior lighting:

32 4 ft. 4-lamp fluorescent fixtures
16 60W incandescent bulbs
2 exit signs

Interior lighting retrofit:

32 4 ft. 36W LED fixtures
16 10W LEDs
2 LED exit signs

Incentives, actual savings and payback periods vary depending on the equipment installed, building characteristics, energy use patterns, age of existing equipment, location and other parameters specific to the project.

EXAMPLE PROJECT BY THE NUMBERS

20,671 kWh

total energy savings

2.96 kW

total peak demand savings

\$4,548

estimated incentives

\$505

net cost to customer

\$5,053

estimated project cost

2.93 years

project payback

\$2,067

estimated annual savings

MIDSTREAM INSTANT INCENTIVE PARTICIPATING DISTRIBUTOR LOCATIONS

FORT SMITH

- Elliott Electric Supply
- Fort Smith Restaurant Supply
- JM Supply
- Keathley-Patterson Electrical Supply
- Locke Supply
- Wholesale Electric Supply Company

VAN BUREN

- Wholesale Electric Supply Company

Funds are available on a first-come, first-served basis and are limited to \$2,500 per customer, per location, per month.



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ARKANSAS

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APSC FILED TIme: 4/29/2026 4:01:07 PM: Recvd: 4/29/2026 2:59:54 PM: Docket 07-075-TF-Doc. 516

From Name:
Your Energy
From Email Address:
arkansasEE@oqe.com
Subject Line
Up to \$3,000 in energy-saving upgrades could be yours
PreHeader
Start saving today with the OG&E Residential Energy Efficiency Program.
WF-PROJECT
0625_OGEAR_RES_5429381_HEEP_EML_FALL
Email Version
11
Email ID
5429381_15

Can't see the images?
[Click here to see what you're missing](#)

Receive up to
\$3,000 in home
upgrades, at no
out-of-pocket cost



Our Residential Energy Efficiency Program provides energy-saving tools, services and incentives to all customers. From attic to basement, we'll help you discover which upgrades work best for your home and budget.

START SAVING TODAY

Or call **844-413-3065** to get started.

Note: To explore these offerings, you will be directed to the OGE.com login page. Please have your OGE.com username and password ready for seamless enrollment.

Services include:



LED
LIGHTING



ATTIC
INSULATION



WINDOW AND
DOOR SEALING

ENROLL TODAY

Or call **844-413-3065** to get started.



Download the OG&E App.

Pay your bill, report outages, track your energy usage and more.



This email was sent by:
OGE Energy Corp., PO Box 321, Oklahoma City,
OK 73101-0321, US

If you no longer wish to receive email communications on OG&E news, promotions and special offers, [click to unsubscribe](#)

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APSC FILED Time: 4/29/2026 4:01:07 PM: Recvd: 4/29/2026 3:59:54 PM: Docket 07-075-TF-Doc. 516

From Name:	Your Energy
From Email Address:	arkansasEE@oee.com
Subject Line	Energy-saving upgrades at no added cost
PreHeader	See if you qualify for window and door sealing, attic insulation and more.
WF-PROJECT	0625_OGEAR_RES_5429381_HEEP_EML_FALL
Email Version	12
Email ID	5429381_13

Can't see the images?
[Click here to see what you're missing](#)

Receive up to
**\$3,000 in home
upgrades**, at no
out-of-pocket cost



Our Residential Energy Efficiency Program provides energy-saving tools, services and incentives to all customers. From attic to basement, we'll help you discover which upgrades work best for your home and budget.

START SAVING TODAY

Or call **844-413-3065** to get started.

Note: To explore these offerings, you will be directed to the OGE.com login page. Please have your OGE.com username and password ready for seamless enrollment.

Services include:



LED
LIGHTING



ATTIC
INSULATION



WINDOW AND
DOOR SEALING

ENROLL TODAY

Or call **844-413-3065** to get started.



Download the OG&E App.

Pay your bill, report outages, track your energy usage and more.



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From Name:	Your Energy
From Email Address:	arkansasEE@oee.com
Subject Line	
Savings await: Receive up to \$3,000 in energy-saving upgrades!	
PreHeader	
Get window and door sealing, LED lighting and more at no added cost.	
WF-PROJECT	
0625_OGEAR_RES_5429381_HEEP_EML_FALL	
Email Version	
13	
Email ID	
5429381_14	

Can't see the images?
[Click here to see what you're missing](#)

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To maximize SmartHours® savings,
you may qualify for up to **\$3,000**
in home energy upgrades*

You read that right. We can increase your home's energy efficiency with upgrades that lower the cost of your energy bill at **no additional cost** to you.



LED
LIGHTING



SEALING WINDOWS
& DOORS



ATTIC
INSULATION

..... AND MORE

 **844-413-3065** (TOLL-FREE)

*Note: To explore these offerings, you will be directed to the **OGE.com** login page. Please have your **OGE.com** username and password ready for seamless enrollment.*

**The value of the energy efficiency upgrades may vary per household and depend on factors including square footage, gas or electric appliances, and the age of the home. An assessment by a Home Energy Advisor is required to determine the energy efficiency upgrades that may be installed in your home.*



Learn more at
OGE.com/AREfficiency



Scan



We Energize Life
energize.og&e.com

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Our Energy Efficiency Program provides energy-saving tools, services and incentives for qualifying customers. From attic to basement, we'll help you discover which upgrades work best for you home and budget.



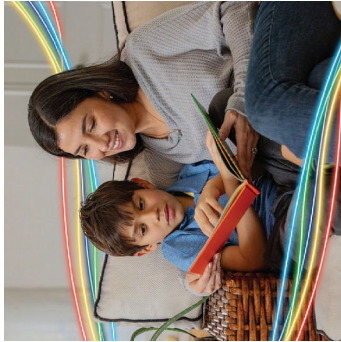
Visit [OGE.com/AREfficiency](https://www.ogelife.com/AREfficiency)
or call **844-413-3065** to
enroll and start saving.

OGE[®] We Energize Life

Contact us to learn more: ogepositiveenergyhomes@clearresult.com

DYNAMIC AD 1: EVERGREEN - AWARENESS

STATIC IMAGE OPTIONS



Primary text (125 char. before cutoff):

- Saving energy is always in season. Save on qualifying home upgrades like attic insulation, sealing windows and doors, LED lighting and more.
- Discover new ways to save energy in your home with up to \$3,000 in energy-saving home improvements for no out-of-pocket cost.
- Explore the savings made possible with up to \$3,000 in home upgrades from OG&E:
 - Attic insulation
 - Seal windows and doors
 - LED lighting
- Sign up today and see how much you can save.
- Sign up and start saving energy when you take advantage of a variety of energy-saving upgrades for your home.
- OG&E wants to help you save energy in your home. Explore home upgrades with no out-of-pocket cost like attic insulation, sealing windows and doors, LED lighting and more.

Headlines (5 max, 27 char. max recommended):

- UP TO \$3,000 IN UPGRADES
- HOME ENERGY EFFICIENCY
- INSULATION AT NO EXTRA COST
- ENERGY SAVINGS PROGRAM
- SAVE ENERGY YEAR-ROUND

Descriptions (5 max, 27 char. max recommended):

- See if you qualify.
- Sign up to get started.
- No out-of-pocket costs
- Sign up, upgrade and save.

CTA Options

- Sign Up
- Call Now (844-413-3065)
- Learn more

Destination URL:

oge.com/AREfficiency

DYNAMIC AD 1: EVERGREEN - AWARENESS



Sponsored

Saving energy is always in season. Save on qualifying home upgrades like attic insulation, sealing windows and doors, LED lighting and more.



Learn more

See if you qualify.
OG&E.com/AREfficiency

20

10 Comments

250 Shares

Like

Comment

Share



Sponsored

Discover new ways to save energy in your home with up to \$3,000 in energy-saving home improvements for no out-of-pocket cost.



Learn more

See if you qualify.
OG&E.com/AREfficiency

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10 Comments

250 Shares

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Sponsored

Sign up and start saving energy when you take advantage of a variety of energy-saving upgrades for your home.



Sign up

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OG&E.com/AREfficiency

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10 Comments

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DYNAMIC AD 1: EVERGREEN - AWARENESS

FRAME 1



Sponsored

Discover new ways to save energy in your home with up to \$3,000 in energy-saving home improvements for no out-of-pocket cost.



UP TO \$3,000 IN
HOME UPGRADES

ENERGY SAVINGS PROGRAM

See if you qualify
OG&E.com/AREfficiency

Learn more

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10 Comments 250 Shares

FRAME 2



FRAME 3



FRAME 4



FRAME 5



DYNAMIC AD 2: EVERGREEN - AWARENESS

FRAME 1



Sponsored

OG&E wants to help you save energy in your home. Explore home upgrades with no out-of-pocket cost like attic insulation, sealing windows and doors, LED lighting and more.



START SAVING WITH QUALIFYING HOME UPGRADES

SAVE ENERGY YEAR-ROUND

See if you qualify.
OG&E.com/AREfficiency

[Learn more](#)

20

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FRAME 2



FRAME 3



FRAME 4



FRAME 5

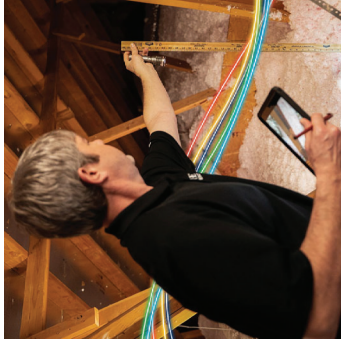


FRAME 6



DYNAMIC AD 2: DYNAMIC SPRING - LEAD GEN

STATIC IMAGE OPTIONS



Primary text (125 char. before cutoff):

- Spring for energy savings and see if you qualify for attic insulation, sealing windows and doors, HVAC tune-ups and more, at no added cost to you.
- Refresh your home for spring with up to \$3,000 in energy-saving home improvements, at no added cost to you.
- Go green this spring and up your home's energy efficiency with upgrades at no added cost to you from OG&E.
- Qualify for up to \$3,000 in home upgrades from OG&E to save energy and money all year long.
- How much energy could you be saving? Save on qualifying home upgrades like attic insulation, sealing windows and doors and HVAC tune-ups from OG&E.

Headlines (5 max, 27 char. max recommended):

- UP TO \$3,000 IN UPGRADES
- INSULATION AT NO EXTRA COST
- SAVE BIG THIS SPRING
- GO GREEN, SAVE ENERGY
- SAVINGS ARE IN BLOOM

Descriptions (5 max, 27 char. max recommended):

- See if you qualify.
- Sign up to get started.
- No out-of-pocket costs
- Sign up, upgrade and save.

CTA Options

- Sign Up
- Call Now (844-413-3065)
- Learn more

Destination URL:

oge.com/AtEfficiency

DYNAMIC AD 2: DYNAMIC SPRING - LEAD GEN



Sponsored

Spring for energy savings and see if you qualify for attic insulation, sealing windows and doors, HVAC tune-ups and more, at no added cost to you.



Learn more

UP TO \$3,000 IN UPGRADES

See if you qualify.

OG&E.com/AREfficiency

20

10 Comments 250 Shares

Like

Comment

Share



Sponsored

Refresh your home for spring with up to \$3,000 in energy-saving home improvements, at no added cost to you.



Sign up

SAVE BIG THIS SPRING

Sign up to get started.

OG&E.com/AREfficiency

20

10 Comments 250 Shares

Like

Comment

Share



Sponsored

Qualify for up to \$3,000 in home upgrades from OG&E to save energy and money all year long.



Learn more

GO GREEN, SAVE ENERGY

No out-of-pocket costs

OG&E.com/AREfficiency

20

10 Comments 250 Shares

Like

Comment

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DYNAMIC AD 3: SUMMER - LEAD GEN

STATIC IMAGE OPTIONS



Primary text (125 char. before cutoff):

- High temps call for high efficiency. Get up to \$3,000 in energy-saving home improvements from OG&E.
- Stay cool and save energy this summer with upgrades for your home at no added cost to you.
- The savings that come with these upgrades from OG&E are piping hot:

- Attic insulation
- Seal windows and doors
- HVAC tune-up

- Schedule today and enjoy energy savings year-round.
- With OG&E, summer savings are in the forecast. See if you qualify for up to \$3,000 in energy-saving home improvements.
- Explore energy-saving upgrades you may qualify for at no added cost.

Headlines (5 max, 27 char. max recommended):

- SAVINGS ARE HEATING UP
- TODAY'S HIGH: YOUR SAVINGS
- HAVE A COOL SUMMER
- UP TO \$3,000 IN UPGRADES
- HOME ENERGY EFFICIENCY

Descriptions (5 max, 27 char. max recommended):

- See if you qualify.
- Sign up to get started.
- No out-of-pocket costs
- Sign up, upgrade and save.

CTA Options

- Sign Up
- Call Now (844-413-3065)
- Learn more

Destination URL:

oge.com/ARefficiency

DYNAMIC AD 3: SUMMER - LEAD GEN



OG&E
Sponsored

High temps call for high efficiency. Get up to \$3,000 in energy-saving home improvements from OG&E.



SAVINGS ARE HEATING UP
See if you qualify
OG&E.com/AREfficiency

[Learn more](#)

20

Like

Comment

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10 Comments 250 Shares



OG&E
Sponsored

Stay cool and save energy this summer with upgrades for your home at no added cost to you.



HAVE A COOL SUMMER
Sign up to get started
OG&E.com/AREfficiency

[Sign up](#)

20

Like

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10 Comments 250 Shares



OG&E
Sponsored

Explore energy-saving upgrades you may qualify for at no added cost.



HOME ENERGY EFFICIENCY
No out-of-pocket costs
OG&E.com/AREfficiency

[Learn more](#)

20

Like

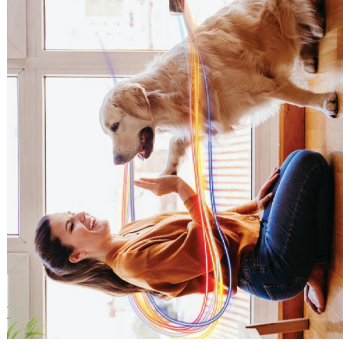
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DYNAMIC AD 4: FALL/WINTER - LEAD GEN

STATIC IMAGE OPTIONS



Primary text (125 char. before cutoff):

- Save on heating costs this winter. See if you qualify for attic insulation, sealing windows and doors, LED lighting and other energy-saving home upgrades at no added cost to you.
- As the temperatures drop, let your savings go up with up to \$3,000 in home upgrades at no added cost to you from OG&E.
- Want to save more energy? You may qualify for up to \$3,000 in energy-efficient home upgrades, like:
 -  Attic insulation
 -  Seal windows and doors
 -  LED lighting
- Sign up today and see how much you can save.
- Stay warm and save this winter with attic insulation, sealing windows and doors, LED lighting and other upgrades at no cost to you from OG&E.
- Cozy up to savings with up to \$3,000 in energy-saving home upgrades that keep the winter chill out and cut energy costs.

Headlines (5 max, 27 char. max recommended):

- UP TO \$3,000 IN UPGRADES
- LOW TEMPS, LOWER ENERGY COSTS
- COZY AT NO EXTRA COST
- WARM UP WITH HOT SAVINGS
- COMFY UP TO SAVINGS

Descriptions (5 max, 27 char. max recommended):

- See if you qualify.
- Sign up to get started.
- No out-of-pocket costs
- Sign up, upgrade and save.

CTA Options

- Sign Up
- Call Now (844-413-3065)
- Learn more

Destination URL:

oge.com/AREfficiency

DYNAMIC AD 4: FALL/WINTER - LEAD GEN



Sponsored

Stay warm and save this winter with attic insulation, sealing windows and doors, LED lighting and other upgrades at no cost to you from OG&E.



COZY AT NO EXTRA COST

See if you qualify.

OG&E.com/AREfficiency

Learn more

20

Like

Comment

Share

10 Comments

250 Shares



Sponsored

Cozy up to savings with up to \$3,000 in energy-saving home upgrades that keep the winter chill out and cut energy costs.



WARM UP WITH HOT SAVINGS

Sign up to get started.

OG&E.com/AREfficiency

Sign up

20

Like

Comment

Share

10 Comments

250 Shares



Sponsored

As the temperatures drop, let your savings go up with up to \$3,000 in home upgrades at no added cost to you from OG&E.



UP TO \$3,000 IN UPGRADES

No out-of-pocket costs

OG&E.com/AREfficiency

Learn more

20

Like

Comment

Share

10 Comments

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SAVE ENERGY AND LIVE **MORE COMFORTABLY**



Did you know?

OG&E customers are eligible for **no out-of-pocket cost** weatherization improvements **valued up to \$3,000.***

Lower your energy costs and increase the comfort of your home with **no out-of-pocket cost** upgrades like:



**WINDOW AND
DOOR SEALING**



**ATTIC
INSULATION**



**HVAC
TUNE-UP**

Looking for other ways to save?

Uncover personalized energy-saving opportunities with an In-Home Energy Assessment to receive advanced power strips, LED bulbs, showerheads and faucet aerators at no out-of-pocket cost to you.

Receive rebates on new ENERGY STAR® certified windows, pool pumps, HVAC systems and more. Visit **OGE.com/rebates#ar** to learn more.

Boost your home's HVAC efficiency with an Advanced A/C Tune-up, or save on a replacement. Call the number below to see if your HVAC system qualifies for an A/C tune-up.

Save instantly on select ENERGY STAR certified products at participating stores.



To sign up for the OG&E Residential Energy Efficiency Program, call **844-413-3065** or visit **OGE.com/ARefficiency**.

*Certain limitations and state-mandated guidelines may apply. Home must be at least 10 years old. Energy efficiency services are available to rental properties if an eligible customer lives in the home and has approval from the property owner.

OG&E

We Energize Life
■■■■■■■■■■

ARKANSAS

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AHORRE ENERGÍA Y VIVA MÁS CÓMODAMENTE



¿Sabía que?

Los clientes de OG&E son elegibles para mejoras de climatización sin costo de bolsillo, con un **valor de hasta \$3,000.***

Reduzca sus costos de energía y aumente la comodidad de su hogar con **mejoras sin costo de bolsillo** como:



**SELLAR VENTANAS
Y PUERTAS**



**AISLAMIENTO
DEL ÁTICO**



**AFINACIÓN
DE HVAC**

¿Buscando otras maneras de ahorrar?

Descubra oportunidades personalizadas de ahorros de energía con una Evaluación de Energía en el Hogar para recibir regletas avanzadas, focos LED, regaderas y aireadores de grifos sin costo de bolsillo alguno para usted.

Reciba reembolsos en ventanas con certificación ENERGY STAR®, bombas de piscina, sistemas HVAC y más. Visite **OG&E.com/rebates#ar** para aprender más.

Aumente la eficiencia del equipo de HVAC en su hogar con una Afinación Avanzada del Aire Acondicionado o ahorre con un reemplazo. Llame el número abajo para ver si su sistema HVAC califica para una afinación del aire acondicionado.

Ahorre al instante en productos selectos con certificación ENERGY STAR en tiendas participantes.



Para inscribirse en Programa de Eficiencia Energética Residencial de OG&E, llame al **844-413-3065** o visite **OG&E.com/AREfficiency**.

*Pueden aplicar ciertas limitaciones y pautas exigidas por el estado. El hogar debe tener al menos 10 años. Los servicios de eficiencia energética están disponibles para propiedades de alquiler si un cliente elegible reside en el hogar y cuenta con aprobación del dueño de la propiedad.

OG&E

Energía para la Vida

ARKANSAS

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RECEIVE UP TO \$3,000* IN HOME UPGRADES, AT NO OUT-OF-POCKET COST

Our Energy Efficiency Program helps qualified customers save on home upgrades. Services include:



WINDOW AND
DOOR SEALING



ATTIC
INSULATION



HVAC
TUNE-UP**



Scan to enroll

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start saving.

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**The HVAC Tune-Up is a seasonal service offered from April 1 – October 1, weather permitting. Limited to appointment availability.



OG+E®

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or call 844-413-3065 to
enroll and start saving.

OGE[®]

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APSC FILED TIR 4/29/2026 4:01:07 PM: Recvd 4/29/2026 3:58:54 PM: Docket 07-075-TF-Doc. 516

From Name:	Your friend
From Email Address:	no-reply-oge@em.clearesult.com
Subject Line	Up to \$3,000 in energy-saving upgrades could be yours
PreHeader	Start saving today with the OG&E Residential Energy Efficiency Program.
WF-PROJECT	1224_OGEAR_RES_4917896_HEEP_EML
Email Version	1.1
Email ID	4917896_30

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DOOR SEALING

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Your friend's email address: **you**
From Email Address: **you**
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Subject Line
Energy-saving upgrades at no added cost
PreHeader
See if you qualify for window and door sealing, attic insulation and more.
WF-PROJECT
1224_OGEAR_RES_4917896_HEAP_EML
Email Version
1.2
Email ID
4917896_31

Receive up to \$3,000 in home upgrades, at no out-of-pocket cost



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Services include:HVAC
TUNE-UP®

ATTIC INSULATION



WINDOW AND DOOR SEALING

ENROLL TODAY

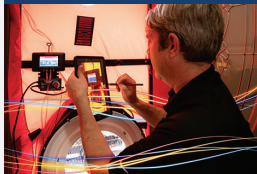
Pay your bill, report outages, track your energy usage and more.



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From Name: How to fix a leaking faucet
From Email Address: no-reply-q@em.clearsult.com
Subject Line Savings alert: Receive up to \$3,000 in energy-saving upgrades!
PreHeader Get attic insulation, window and door sealing, and more at no added cost.
WF-PROJECT
1224_OGEAR_RES_4917896_HEAP_EML
Email Version 1.3
Email ID 4917896_32

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We Energize Life

**BOOST HOME COMFORT
& CUT ENERGY COSTS**

OGE.com/HomeComfort

OGE

**BOOST HOME COMFORT
& CUT ENERGY COSTS**

OGE.com/HomeComfort

OGE

Energizing communities

2024 IMPACT AT A GLANCE



We Energize Life



Supporting families with low income

Collected **3,892** feminine hygiene products for at-risk youth

Provided more than **\$232,000** for household repairs for customers to qualify for OG&E's Energy Efficiency Program

26,266 homes received energy efficiency upgrades



More than

\$1.3 MILLION
donated to United Way

\$1.4 MILLION

in partnership with nonprofits and state and federal agencies for utility bill assistance



Donated **4,300 tickets** + food vouchers to OKC Thunder games through the Community Ticket Program, benefiting schools and nonprofits



Re-energized **7** community basketball courts in partnership with the Thunder Community Foundation

Powering education

\$180,000

in Positive Energy Scholarships for **3 seniors**



Helped fund **231** projects for **135** teachers across **83** schools

Sponsored event to provide **2,400** educators with supplies



Supported **3,500+** 6th-12th graders through mentorship, career fairs and leadership program

Taught **447** K-4th graders about financial literacy through Junior Achievement



The OGE Energy Corp. Foundation awarded nearly **\$1.3 million** to **56 nonprofits** across OG&E's service area

Employees in action

16,414

volunteer hours



139

employees serve across

234 boards

Caring for seniors



1,800 electric fans donated



2,328 meals delivered



100 volunteers participated in Rebuilding Together & She Builds

Environmental stewardship



1,140,000

pounds of vegetation provided to the OKC Zoo

Collected **911 lbs** of trash and **5,520 lbs** of wood debris from the Oklahoma River for World Water Day



592,680

LED light bulbs donated or provided at no out-of-pocket cost

Removed **151,153** metric tons of CO₂ from the atmosphere through residential and commercial energy efficiency programs

ARKANSAS ACADEMIC STANDARDS*

GRADE 6

LANGUAGE ARTS

READING IN SCIENCE AND TECHNICAL SUBJECTS

RST.6-8.1	Cite specific textual evidence to support analysis of science and technical texts.
RST.6-8.2	Determine the central ideas or conclusions of a text; provide an accurate summary of the text distinct from prior knowledge or opinions.
RST.6-8.3	Follow precisely a multistep procedure when carrying out experiments, taking measurements, or performing technical tasks.
RST.6-8.4	Determine the meaning of symbols, key terms, and other domain-specific words and phrases as they are used in a specific scientific or technical context relevant to Grades 6–8 texts and topics.
RST.6-8.5	Analyze the structure an author uses to organize a text, including how the major sections contribute to the whole and to an understanding of the topic.
RST.6-8.6	Analyze the author's purpose in providing an explanation, describing a procedure, or discussing an experiment in a text.
RST.6-8.7	Integrate quantitative or technical information expressed in words in a text with a version of that information expressed visually (e.g., in a flowchart, diagram, model, graph, or table).
RST.6-8.8	Distinguish among facts, reasoned judgment based on research findings, and speculation in a text.
RST.6-8.9	Compare and contrast the information gained from experiments, simulations, video, or multimedia sources with that gained from reading a text on the same topic.
RST.6-8.10	By the end of grade 8, read and comprehend science/technical texts in the grades 6-8 text complexity band independently and proficiently.

READING: INFORMATIONAL TEXT

RI.6.1	Cite textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.
RI.6.2	Examine a grade-appropriate informational text. Provide an objective summary. Determine a central idea and how it is conveyed through particular details.
RI.6.3	Analyze in detail how a key individual, event, or idea is introduced, illustrated, and elaborated in a text.
RI.6.4	Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings.
RI.6.5	Analyze how a particular sentence, paragraph, chapter, or section fits into the overall structure of a text and contributes to the development of the ideas.
RI.6.6	Determine an author's point of view, perspective, and/or purpose in a text and explain how it is conveyed in the text.
RI.6.7	Integrate information presented in different media or formats (e.g., visually, quantitatively) as well as in words to develop a coherent understanding of a topic or issue.
RI.6.8	Trace and evaluate the argument and specific claims in a text, distinguishing claims that are supported by reasons and evidence from claims that are not.
RI.6.10	By the end of the year, read and comprehend literary nonfiction in the Grades 6-8 text complexity band proficiently, with scaffolding as needed at the high end of the range.

*State Academic Standards derived from multiple, independent sources exhibit the most current information available to date.

ARKANSAS ACADEMIC STANDARDS*

GRADE 6

LANGUAGE ARTS

WRITING

W.6.1	Write arguments to support claims with clear reasons and relevant evidence.
W.6.2	Write informative/explanatory texts to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content.
W.6.3	Write narratives to develop real or imagined experiences or events using effective technique, relevant descriptive details, and well-structured event sequences.
W.6.4	Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.
W.6.9	Draw evidence from literary and/or informational texts to support analysis, reflection, and research.
W.6.10	Write routinely over extended time frames and shorter time frames for research, reflection, and revision and shorter time frames for a range of discipline-specific tasks, purposes, and audiences.

SPEAKING AND LISTENING

SL.6.1	Engage effectively in a range of collaborative discussions one-on-one, in groups, and teacher-led with diverse partners on grade 6 topics, texts, and issues, building on others' ideas and expressing their own clearly.
SL.6.4	Present claims and findings, sequencing ideas logically and using pertinent descriptions, facts, and details to accentuate main ideas or themes; use appropriate eye contact, adequate volume, and clear pronunciation.

LANGUAGE

L.6.4	Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on Grade 6 reading and content, choosing flexibly from a range of effective strategies.
L.6.6	Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.

WRITING IN SCIENCE AND TECHNICAL SUBJECTS

WHST.6-8.1	Write arguments focused on discipline-specific content.
WHST.6-8.2	Write informative/explanatory texts, including the narration of historical events, scientific procedures/ experiments, or technical processes.
WHST.6-8.4	Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.
WHST.6-8.9	Draw evidence from informational texts to support analysis, reflection, and research.
WHST.6-8.10	Write routinely over extended time frames (time for reflection and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.

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ARKANSAS ACADEMIC STANDARDS*

GRADE 6

MATHEMATICS

RATIOS AND PROPORTIONAL RELATIONSHIPS

6.RP.A.1	Understand the concept of a ratio and use ratio language to describe a ratio relationship between two quantities.
6.RP.A.2	Understand the concept of a unit rate a/b associated with a ratio $a:b$ with $b \neq 0$, and use rate language in the context of a ratio relationship.
6.RP.A.3	Use ratio and rate reasoning to solve real-world and mathematical problems (e.g., by reasoning about tables of equivalent ratios, tape diagrams, double number line diagrams, or equations).

THE NUMBER SYSTEM

6.NS.B.2	Use computational fluency to divide multi-digit numbers using a standard algorithm.
6.NS.B.3	Use computational fluency to add, subtract, multiply, and divide multi-digit decimals using a standard algorithm for each operation.
6.NS.C.5	Understand that positive and negative numbers are used together to describe quantities having opposite directions or values, explaining the meaning of 0 (e.g., temperature above/below zero).

EXPRESSIONS AND EQUATIONS

6.EE.A.1	Write and evaluate numerical expressions involving whole-number exponents.
6.EE.A.2	Write, read, and evaluate expressions in which letters stand for numbers.
6.EE.B.6	Use variables to represent numbers and write expressions when solving a real-world or mathematical problem; understand that a variable can represent an unknown number or any number in a specified set.

GEOMETRY

6.G.A.2	Find the volume of a right rectangular prism with fractional edge lengths by packing it with unit cubes of the appropriate unit fraction edge lengths, and show that the volume is the same as would be found by multiplying the edge lengths of the prism. Apply the formulas $V = lwh$ and $V = bh$ to find volumes of right rectangular prisms with fractional edge lengths in the context of solving real-world and mathematical problems.
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STATISTICS AND PROBABILITY

6.SP.A.1	Recognize a statistical question as one that anticipates variability in the data related to the question and accounts for it in the answers.
6.SP.B.4	Display numerical data in plots on a number line, including dot plots, histograms, and box plots.
6.SP.B.5	Summarize numerical data sets in relation to their context, such as by: reporting the number of observations and describing the nature of the attribute under investigation, including how it was measured and its units of measurement.

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ARKANSAS ACADEMIC STANDARDS*

GRADE 6

SCIENCE

PHYSICAL SCIENCES

6-PS3-3.	Apply scientific principles to design, construct, and test a device that either minimizes or maximizes thermal energy transfer.
6-PS3-4.	Plan an investigation to determine the relationships among the energy transferred, the type of matter, the mass, and the change in the average kinetic energy of the particles as measured by the temperature of the sample.
6-PS3-5.	Construct, use, and present arguments to support the claim that when the kinetic energy of an object changes, energy is transferred to or from the object.

EARTH AND SPACE SCIENCES

6-ESS2-4.	Develop a model to describe the cycling of water through Earth's systems driven by energy from the sun and the force of gravity.
6-ESS3-3.	Apply scientific principles to design a method for monitoring and minimizing a human impact on the environment.
6-ESS3-4.	Construct an argument supported by evidence for how increases in human population and per-capita consumption of natural resources impact Earth's systems.

ENGINEERING DESIGN

6-ETS1-1.	Define the criteria and constraints of a design problem, accounting for scientific principles and impacts on people and the natural environment that may limit possible solutions.
6-ETS1-2.	Evaluate competing design solutions using a systematic process to determine how well they meet the criteria and constraints of the problem.
6-ETS1-3.	Analyze data to determine similarities and differences to identify the best characteristics of each that can be combined into a new solution to better meet the criteria for success.
6-ETS1-4.	Develop a model to generate data for iterative testing and modification of a proposed object, tool, or process such that an optimal design can be achieved.

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PARENTS**OG/E[®]****We Energize Life**
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CONGRATULATIONS!

Your child's class has been selected to participate in the exciting LivingWise Program. The program is designed to teach your child the value of water and energy and help you save money on your utility bills. This program is being provided by **Oklahoma Gas & Electric** at NO COST to you, your child's school, or the school district.

The average U.S. household pays at least \$2,000 per year in utility bills and can reduce these costs with just a few simple changes. Your child will be given a kit which includes FREE high quality energy-saving and water-saving products that utilize the latest efficiency technology. This kit is valued at over \$60 and will provide you with the ability to make these changes.

To participate, please do the following:

- Explore the kit with your child and discuss how the products can conserve water and energy for your family.
- Install all of the kit items. You and your child can do most of the activities in less than 15 minutes. Visit www.getwise.org to view installation videos or call 1-888-GET-WISE.
- Work with your child to answer all of the survey questions in the Take-Home Workbook.

The LivingWise Program will be an easy and fun experience for your entire family. Not only will it allow your child the chance to be a leader in your home and community, but also your family will immediately benefit from lower utility bills. Thank you for your participation.

LET'S GET STARTED!



QUESTIONS? • 1-888-GET-WISE • www.getwise.org

PADRES**OG+E®****We Energize Life**
.....

¡FELICITACIONES!

La clase de su hijo ha sido seleccionada para participar en el fascinante Programa LivingWise. El programa está diseñado para enseñarle a su hijo el valor del agua y de la energía y para ayudarlo a usted a ahorrar dinero en sus facturas de servicios públicos. Este programa lo provee **Oklahoma Gas & Electric** SIN COSTO para usted, la escuela de su hijo ni el distrito escolar.

La vivienda promedio estadounidense paga por la mínima \$2,000 por año en facturas de servicios públicos y puede reducir estos costos simplemente con algunos cambios sencillos. A su hijo se le dará un kit que incluye productos GRATUITOS de alta calidad para el ahorro de agua y energía que utilizan la tecnología de ahorro más moderna. Este kit tiene un valor de más de \$60 y le dará a usted la habilidad de implementar estos cambios.

Para participar, por favor haga lo siguiente:

- Explore el kit con su hijo y discuta cómo los productos pueden conservar agua y energía para su familia.
- Instale todos los artículos del kit. Usted y su hijo pueden hacer la mayoría de las actividades en menos de 15 minutos. Visite www.getwise.org para ver videos de instalación o llame al 1-888-GET-WISE.
- Trabaje con su hijo para responder todas las preguntas de la encuesta en el Libro de Trabajo para llevar a casa.

El Programa LivingWise será una experiencia sencilla y divertida para toda su familia. No sólo le permitirá a su hijo la posibilidad de ser un líder en su hogar y en su comunidad, sino que también su familia se beneficiará inmediatamente por las facturas más bajas de los servicios públicos. Gracias por su participación.

¡COMENCEMOS!



¿PREGUNTAS? • 1-888-GET-WISE • www.getwise.org

FIRST NAME _____

TEACHER _____

SCHOOL _____

DATE _____



PRE-PROGRAM QUIZ

- Which of the following is not a fossil fuel?
 - ☐ Wind
 - ☐ Coal
 - ☐ Oil
 - ☐ Natural Gas
- Which of the following is a renewable resource?
 - ☐ Oil
 - ☐ Water
 - ☐ Gold
 - ☐ Natural Gas
- Saving water saves energy.
 - ☐ True
 - ☐ False
- What is the unit of measure for electricity consumption?
 - ☐ Therm
 - ☐ Kilowatt
 - ☐ Kilowatt-Hour
 - ☐ Pounds
- Energy stored within any physical thing is called ...
 - ☐ Nuclear Energy
 - ☐ Kinetic Energy
 - ☐ Mechanical Energy
 - ☐ Potential Energy
- Which are examples of distributed generation?
 - ☐ Solar panels on your home
 - ☐ A wind turbine at your home
 - ☐ Using fuel cells at home
 - ☐ All of the above
- Which major appliance uses the most energy?
 - ☐ Dishwasher
 - ☐ Refrigerator
 - ☐ Clothes Dryer
- A high-efficiency showerhead can save...
 - ☐ Water
 - ☐ Energy
 - ☐ Both
- An item that continues to use electricity even though its switch may be in the "off" position is called...
 - ☐ Transformer
 - ☐ Phantom Load
 - ☐ Peak Load
 - ☐ High Efficiency
- Advanced power strips, when used properly, can reduce phantom load.
 - ☐ True
 - ☐ False

HOME CHECKUP

- How many people live in your home (including you)?
 - ☐ 1
 - ☐ 2
 - ☐ 3
 - ☐ 4
 - ☐ 5
 - ☐ 6
 - ☐ 7+
- How is your water heated?
(Hint: A natural gas water heater will have a gas line connected to the bottom of it where there is an "on/off" dial, and it will always have a flue, or a circular tube connected to the top of it and extending up to the roof. An electric water heater will not have a gas line attached, only a heavy duty electric cord plugged into the wall, and will not have a flue.)
 - ☐ Natural Gas
 - ☐ Electricity
 - ☐ Propane
- Does your home have a dishwasher?
 - ☐ Yes
 - ☐ No
- How many half-bathrooms are in your home?
(Hint: Half bathrooms are bathrooms that do not have a shower or a bathtub.)
 - ☐ 0
 - ☐ 1
 - ☐ 2
 - ☐ 3
 - ☐ 4+
- How many full bathrooms are in your home?
 - ☐ 1
 - ☐ 2
 - ☐ 3
 - ☐ 4
 - ☐ 5+
- Which fuel is used as the main source of energy to heat your home?
(Your parent/guardian should know.)
 - ☐ Natural Gas
 - ☐ Electricity
 - ☐ Heating Oil
 - ☐ Wood
 - ☐ Propane
 - ☐ Other
- What type of air conditioning unit do you have?
 - ☐ Central Air Conditioner
 - ☐ Evaporative Cooler
 - ☐ Room Unit
 - ☐ Don't Have One
- What type of home do you live in?
 - ☐ Single Family Home
 - ☐ Multi-Family Home/Apartment Building
- Was your home built before 1992?
 - ☐ Yes
 - ☐ No
- Is your home owned or rented?
 - ☐ Owned
 - ☐ Rented



POST-PROGRAM QUIZ

- Which of the following is not a fossil fuel?
 - ☐ Wind
 - ☐ Coal
 - ☐ Oil
 - ☐ Natural Gas
- Which of the following is a renewable resource?
 - ☐ Oil
 - ☐ Water
 - ☐ Gold
 - ☐ Natural Gas
- Saving water saves energy.
 - ☐ True
 - ☐ False
- What is the unit of measure for electricity consumption?
 - ☐ Therm
 - ☐ Kilowatt
 - ☐ Kilowatt-Hour
 - ☐ Pounds
- Energy stored within any physical thing is called ...
 - ☐ Nuclear Energy
 - ☐ Kinetic Energy
 - ☐ Mechanical Energy
 - ☐ Potential Energy
- Which are examples of distributed generation?
 - ☐ Solar panels on your home
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 - ☐ Using fuel cells at home
 - ☐ All of the above
- Which major appliance uses the most energy?
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 - ☐ Refrigerator
 - ☐ Clothes Dryer
- A high-efficiency showerhead can save...
 - ☐ Water
 - ☐ Energy
 - ☐ Both
- An item that continues to use electricity even though its switch may be in the "off" position is called...
 - ☐ Transformer
 - ☐ Phantom Load
 - ☐ Peak Load
 - ☐ High Efficiency
- Advanced power strips, when used properly, can reduce phantom load.
 - ☐ True
 - ☐ False

HOME ACTIVITIES

- Did your family install the new High-Efficiency Showerhead?
 - ☐ Yes
 - ☐ No
- Did your family install the new Bathroom Faucet Aerator?
 - ☐ Yes
 - ☐ No
- Did your family install the new Kitchen Faucet Aerator?
 - ☐ Yes
 - ☐ No
- Did your family install the Advanced Power Strip in your home?
 - ☐ Yes
 - ☐ No
- If you answered "yes" to question 4, where did you install your Advanced Power Strip?
 - ☐ TV System
 - ☐ Computer System
 - ☐ Other
- If you answered "yes" to question 4, did you receive help from your parents to install the Advanced Power Strip?
 - ☐ Yes
 - ☐ No
- Did your family install the LED Night Light?
 - ☐ Yes
 - ☐ No
- Did your family raise the temperature on your refrigerator?
 - ☐ Yes
 - ☐ No
- How much did your family turn down the thermostat in winter for heating?
 - ☐ 1 - 2 Degrees
 - ☐ 3 - 4 Degrees
 - ☐ 5+ Degrees
 - ☐ Didn't Adjust Thermostat
- How much did your family turn up the thermostat in summer for cooling?
 - ☐ 1 - 2 Degrees
 - ☐ 3 - 4 Degrees
 - ☐ 5+ Degrees
 - ☐ Didn't Adjust Thermostat
- Did your family lower your water heater settings?
 - ☐ Yes
 - ☐ No
- Did you work with your family on this program?
 - ☐ Yes
 - ☐ No
- Did your family change the way they use energy?
 - ☐ Yes
 - ☐ No
- How would you rate the LivingWise Program?
 - ☐ Great
 - ☐ Pretty Good
 - ☐ Okay
 - ☐ Not So Good



OGE[®]

We Energize Life

CERTIFICATE OF ACHIEVEMENT

Awarded to

for making a difference in your community
by successfully completing the LivingWise[®] Program.

Sandra Cipriani

Sandra Cipriani, Manager of Curriculum Development



LIVINGWISE[®]
PROGRAM

LivingWise® Program Contents

Each program includes the following materials:

Student Materials

- *Student Guide*
- *Take-Home Workbook*
- *LivingWise Kit (shown below)*
- *Parent Letter/Pledge Form*
- *Student Survey Form*
- *Certificate of Achievement*
- *Unlimited Website Access*
- *Toll-Free HELP Line*
- *“OG&E” Wristband*

Teacher Materials

- *Teacher Book*
- *Step-by-Step Program Checklist*
- *Program At A Glance*
- *State Academic Standards Sheets*
- *Electricity, Water, and Natural Gas Posters*
- *Teacher Survey Form*
- *Unlimited Website Access*
- *Toll-Free HELP Line*
- *Self-Addressed Postage-Paid Envelope*

LivingWise Kit*

- *High-Efficiency Showerhead*
- *Advanced Power Strip*
- *Kitchen Faucet Aerator*
- *Bathroom Faucet Aerator*
- *Digital Thermometer*
- *LED Night Light*
- *Flow Rate Test Bag*
- *Parent/Guardian Program Evaluation*
- *Quick Start Guide*
- *Installation Instruction Booklet*
- *Spanish-Translated Materials*



*Actual kit items may vary.



WELCOME

Thank you for choosing to participate! The LivingWise® Program will help your students and their families learn the importance of natural resources and immediately lower their utility bills. **Oklahoma Gas & Electric** has fully paid for and provided this program for your class.

Verify the receipt of the following Program Materials:

- Student Guides (one for each student and teacher)
- Take-Home Workbooks (one for each student and teacher)
- Teacher Book
- Student Wristbands
- Energy Saving Take Home Kits (one for each student and teacher)

Verify the receipt of the following Teacher Folder Contents:

- Introduction Letter to Parents/Guardians (yellow paper)
- Teacher Survey form (also available online)
- Student Survey forms (also available online)
- Certificate of Achievement awards
- Postage-Paid Return Envelope for Student Surveys and Teacher Survey form
- Classroom Poster(s)
- ELA, Math, and Science State Academic Standards sheets

To ensure program success and your eligibility for an e-Gift Card, please do the following:

- **IMPLEMENT THE PROGRAM.** The program provides flexible lessons that can be included in your current curriculum or presented independently. The materials are aligned to state academic standards to reinforce grade level topics.
- **HAVE YOUR STUDENTS INSTALL ALL OF THE PRODUCTS IN THE KIT.** Installation of the products is essential for learning how to conserve at home. The more products that are installed, the higher probability that the program will be available in future years.
- **RETURN PROGRAM RESULTS.** The responses on the Student Survey form and the Teacher Survey are used for program effectiveness and to help to determine program availability for the following year. Students also have the option to write thank-you notes to the utility provider. Return the Student Survey forms, the Teacher Survey form, and any thank-you notes in the provided postage-paid envelope.

Questions? Call 1-888-GET-WISE or visit www.getwise.org.

LET'S BEGIN!

1. Display **Posters** in your classroom. Then, go to getwise.org, log in using your teacher code, and print the **Word Wall Vocabulary List** and display in your classroom. Teacher code login link is listed below.
2. In the *Teacher Book*, review the *Program At A Glance*. Then, view the suggested **Program Pacing Guide** located at getwise.org. Finally, determine a pace that best aligns with your class schedule and curriculum.
3. Explore getwise.org to view teacher presentations, lesson plan ideas, student activities, and other supplemental materials to guide your planning.
4. Make copies of the **Parent/Guardian Letter** to send home with the students. The letter will accompany the *Take-Home Workbook* and the **Energy Saver Kit**.
5. Administer the **Pre-Program Quiz** section of the **Student Survey** form. *The Home Checkup and Home Activities sections of this form are also in the Take-Home Workbook and will first be completed at home. Students will transfer their answers to the Student Survey form at the end of the program.* Keep the Student Survey forms until program completion.
6. Distribute the *Student Guides* and begin! Complete as much of the program that is applicable to your curriculum.
7. Distribute the Parent Letters, the *Take-Home Workbooks*, and the Kits for students to take home. Students will install the kit products, complete optional workbook activities, and complete the **Home Checkup** and **Home Activities** pages with their parent/guardian.
8. Students return *Take-Home Workbooks* to school and transfer answers from the Home Checkup and Home Activities pages to their Student Survey form. *Encourage students to answer as many questions as possible on the form, regardless of the completion of the workbook activities and/or the installation of all the products. Partial responses to these sections are acceptable!*
9. Administer the **Post-Program Quiz**. Collect the Student Survey forms, including partially completed surveys. Complete the **Teacher Survey** form included in your folder or use the QR Code listed below. Place all survey forms and any thank-you notes into the postage-paid envelope and kindly return to the provided address.
10. **Distribute Certificate of Achievement awards and Student Wristbands.**

Congratulations on the completion of the program!



Teacher Code Login:

<https://enrollment.getwise.org/TeacherMaterials>



Teacher Survey:

<https://tinyurl.com/37d9tu2p>

DON'T LET TIME RUN OUT



Simply return 80% of your completed surveys by May 20, 2026, and you'll receive a **\$50.00** Mini Grant for your classroom!

And don't forget to give a wristband reward to your students when they return their completed surveys to you!



Offer open only to teachers participating in the program. Certain restrictions may apply. Good while supplies last. Offer ends May 20, 2026. 80% return rate of completed participant survey forms required for eligibility. For more information call 1-888-GET-WISE or contact us online at www.getwise.org.



LIVINGWISE
PROGRAM