



focus on energy®

Partnering with Wisconsin utilities

REQUEST FOR CONCEPT PAPERS

FOR:

Focus Forward Initiative

Concepts Due: March 20, 2020

Due to: Aptim Government Solutions, LLC

Wisconsin's FOCUS ON ENERGY® Program Administrator

Issued: February 20, 2020

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1. Focus Forward Request for Concept (RFCP) Papers Summary Information

The Program Administrator for Focus on Energy (Focus) launched a new product development process in Quad III called Focus Forward. The Focus Forward Initiative targets research and/or development projects that will benefit the design and delivery of Focus. The Focus Forward Initiative has issued this Request for Concept Papers (RFCP) for the selection of research and/or development projects to create new knowledge in the areas of energy efficiency and renewable energy program design and delivery in Wisconsin.

Focus is funded by the state's investor-owned energy utilities, as required under Wis. Stat. § 196.374(2)(a), and participating municipal and electric cooperative utilities¹. These projects are funded by the Environmental & Economic Research and Development (EERD) program. More information on EERD can be found at <http://www.focusonenergy.com/about/research>.

Eligibility and other EERD Applicant Considerations

- A total of up to \$400,000 is available for research projects in this funding cycle. These funds are anticipated to be awarded across four (4) to six (6) research and/or development projects.
 - These research projects include but are not limited to the concepts identified in this RFCP.
 - Focus reserves the right to award all or a part of this funding in this cycle.
- Research and/or development projects funded by EERD are **not** meant to duplicate evaluation, measurement and verification (EM&V) of Focus programs. However, Focus evaluation reports are available for researcher reference at <http://www.focusonenergy.com/about/evaluation-reports>.

Timeline

Key Events	Key Date
Call for Concept Papers Issued	February 20, 2020, 5:00PM CT
Applicant Questions due	February 26, 2020, 11:59PM CT
Applicant Q&A Response Document Posted	March 4, 2020, 5:00PM CT
Concept Papers Due	March 20, 2020, 11:59PM CT
Notification of Successful Applicant(s)	April 13, 2020, 5:00PM CT
Applicant(s) Accepts	April 20, 2020, 11:59PM CT

¹ The SEERA members mainly include representatives from various Focus participating Wisconsin utilities. The following utilities and entities are presently represented on the SEERA Board: Wisconsin Public Service; St. Croix Natural Gas; North Central Power Company/Northwestern Wisconsin Electric; Superior Water, Light & Power; Versoco; Xcel Energy; We Energies; Madison Gas & Electric; and Alliant Energy.

2. 2020 Focus Forward Research Topics

Focus Forward is seeking concepts for research projects to inform program design and implementation of energy efficiency and renewable energy programs in Wisconsin. Your concept should indicate how your research addresses new, Wisconsin-specific questions that have not been dealt with extensively in literature or primary research and can be directly applied to the design and delivery of Focus and its offerings.

Research plans should aim to produce results in 12 months or less to enable impact on program implementation in the near-term. Research contracts awarded through this process are anticipated to end no later than January 31, 2021; however, somewhat longer timeframes may be allowed, if appropriate.

2.1 2020 EERD Research Topics

The 2020 Research Topics can be found in Appendix A and are summarized below.

Focus will accept Concept Papers addressing both these topics and other topics that are relevant to energy efficiency and renewable energy program design or delivery in Wisconsin. In general, Focus will consider five-page Concept Papers that address the following areas:

- Assessments and recommendations of demand response (DR) and DR-ready initiatives that
 - (1) extend or complement existing offerings and address potential future load constraints and/or affordability by shifting loads to off-peak times,
 - (2) control loads in real-time, and/or
 - (3) additional DR strategies.
- Primary research specific to the Wisconsin market to determine pathways Focus can take to capture a similar level of energy savings (cost-effectively) typically seen from screw-based LED lighting, specific to the residential sector. Pathways include but are not limited to measures, offerings, strategies, actions or other possibilities to identify and achieve savings.
- Focus will also accept other relevant concepts that the Applicant believes will advance Focus and provide environmental and economic benefits to Wisconsin rate payers.²

Your Concept Paper should indicate which of the research topics is being addressed or whether you are proposing research on an alternate topic. The research topics for 2020 were chosen to inform Focus Solutions and offerings, provide a balance of research between sectors, technologies and strategies, and address new, Wisconsin-specific questions that have not been dealt with extensively in prior research. If proposing an alternate topic, state clearly how that research is new, Wisconsin-specific and how results will be directly applied to the design and delivery of Focus offerings.

² See Appendix B – Supplemental Background on Focus

3. Focus on Energy Background & Governance³

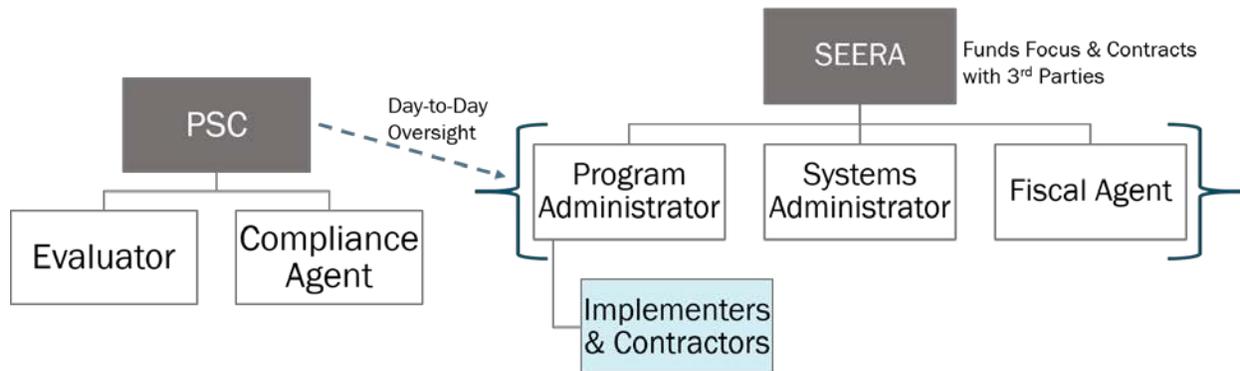
Focus is funded by Wisconsin's investor-owned energy utilities, as required under Wis. Stat. § 196.374(2)(a) and participating municipal and electric cooperative utilities. Focus provides Customers with technical assistance and financial Incentives to help them complete projects that otherwise would not be completed. Participating residents or business owners must be Customers of a participating utility. Capitalized terms not otherwise defined shall have the meaning provided in the *Focus Policy Manual*⁴, available at www.focusonenergy.com/administrative-resources.

The primary roles and organizations that make up Focus include:

- **Statewide Energy Efficiency and Renewables Administration (SEERA):** This organization, created by and consisting of investor-owned utilities, collectively funds and contracts for the administration of the statewide energy efficiency and renewable energy programs.
- **Public Service Commission of Wisconsin (PSC):** This is the independent state agency that regulates Wisconsin's public utilities and oversees Focus.
- **Program Evaluator:** The organization performs annual process and impact evaluations and assesses Program and portfolio cost-effectiveness.
- **Compliance Agent:** The organization performs annual audits of Focus activities and expenditures to ensure that funds are spent prudently and consistently with the *Focus Policy Manual*.
- **Program Administrator:** The Administrator is responsible for (1) working with the PSC to establish portfolio, Market Sector, and individual program goals and budgets; (2) bidding out all programs and selecting and negotiating contracts; and (3) managing program and portfolio Performance and goals. The Administrator is not allowed to implement programs in Wisconsin.
- **Systems Administrator:** The organization manages the Focus enterprise database software system and other software systems utilized for Focus.
- **Fiscal Agent:** The Fiscal Agent is responsible for paying all approved invoices and incentives for Focus. Incentives are paid by the Fiscal Agent.
- **Applicants and Program Contractors:** These organizations deliver energy efficiency and renewable energy programs to eligible Wisconsin utility Customers and are responsible for meeting the Program goals as established by the Administrator and PSC.

³ Additional background about Focus is located in Appendix B.

⁴ The *Focus Policy Manual* is located in Appendix C.



Focus works with eligible Wisconsin residents and businesses to install cost-effective energy efficiency and renewable energy projects. Focus information, resources and financial incentives help implement projects that would otherwise not be completed or complete projects sooner than scheduled. Its efforts help Wisconsin residents and businesses manage rising energy costs, control the state's growing demand for electricity and natural gas, promote in-state economic development, and protect our environment.

Focus aims to:

- Reduce the amount of energy used per unit of production in Wisconsin while improving energy reliability.
- Enhance economic development and make Wisconsin firms more competitive.
- Reduce the environmental impacts of energy use.
- Expand the ability of markets to deliver energy-efficient and renewable energy goods and services to consumers and businesses.
- Deliver quantified financial returns on public investments in energy improvement.

More information on Focus can be found at <http://www.focusonenergy.com/>.

4. Submission Provisions

4.1 Submission Requirements

Final submissions must be sent electronically to RFP@focusonenergy.com and received no later than March 20, 2020 at 11:59PM CT. Concept Papers received by this time will be considered final and revisions will not be accepted. Submissions should be no smaller than size 11 font with 1" margins, Submission emails should be no larger than 75 megabytes (MB). Hard-copy or faxed proposals will not be accepted. Applicants will receive confirmation that their applications have been received by e-mail response. Applicants are encouraged to submit well in advance of the deadline to allow time to resolve any transmission issues.

4.2 Questions

For questions about this solicitation, please e-mail RFP@focusonenergy.com. Responses to questions received will be posted on March 4, 2020 by 5:00PM CT on the Focus website here:

<https://focusonenergy.com/about/rfp>

4.3 Concept Paper Withdrawal

Focus reserves the sole and absolute right to withdraw this RFCP at any time before the duly authorized execution of the contract with Applicants for any reason, including but not limited to action by the PSC that modifies or withdraws the offering. In its sole and absolute discretion, Focus may accept or reject any or all proposals and may accept other than the most cost-effective proposal. Focus will not assume any liability, under any circumstances, to any Applicant submitting a proposal in response to this RFCP.

4.4 Concept Paper Preparation Cost

Applicant accepts any and all costs and expenses incurred prior to the duly authorized execution to the contract and will not seek any of these costs and expenses from Focus.

4.5 Concept Paper Not Confidential

Focus does not guarantee that concept papers will be kept confidential, including either the paper submitted in response to this Request or any contract/purchase order arising from the solicitation. In addition, Focus may submit Applicant submissions to SEERA or the PSC for review.

Furthermore, Focus, the Administrator and its subcontractors, and the PSC will assume no liability to an Applicant or other party as a result of any public disclosure of any submission or the resulting contract/purchase order.

4.6 Program Conflicts Provisions

The following restrictions apply to all Applicants and Subcontractors:

- Firms that are contracted directly with members of SEERA, the PSC or their subcontractors for Focus are NOT eligible to respond to this RFCP, which includes the Administrator, the Program Evaluator, the Fiscal Agent and the Compliance Agent. Current Focus Implementers are eligible to respond to this RFCP.
- Firms that are implementing voluntary utility programs for Wisconsin utilities and firms that are implementing Commitment to Community (CTC) programs that serve residential Customers, either as prime or Subcontractors, may respond to this RFCP.

4.7 Post-Proposal Negotiation

Focus will negotiate pricing during any post-proposal negotiations with the selected Applicant. Focus has no obligation to enter into negotiations or an agreement with any respondent to this RFCP and may terminate or modify this RFCP at any time without liability or obligation to any respondent. Refer to the Focus website here.⁵

⁵ https://www.focusonenergy.com/sites/default/files/aptim_pi_2020_contract_ts_cs_approved_1.10.20.pdf.

4.8 Financial Requirements

Applicants should have the financial resources and stability to perform the proposed work. The Administrator reserves the right to seek proof of the selected Applicant's financial soundness and, if proof is unsatisfactory, Administrator may disqualify the selected Applicant.

4.9 Compliance with Policies and Procedures

Applicant and its Subcontractor(s) should refer to the *Policy Manual* and *Operational Procedures Guide*⁶ for guidance on Program requirements and how to meet contract deliverables.

5. Concept Paper Instructions & Format

5.1 Concept Paper Format

Concept Papers shall follow the format below and provide sufficient and succinct information to allow initial assessment of the proposed research and qualifications of the proposer. Concept Papers content shall not exceed **seven pages** in length and any information beyond the seven-page limit will be disregarded.

Your submission shall include a cover page and description of qualifications and experience and your research proposal as detailed below, so each submission should total no more than seven pages in length. There are also requirements described in Section 5.3 which will not count towards the page limit. Submissions shall be a single PDF or Microsoft Word file with at least one-inch margins and 11-point font.

5.2 Concept Paper Contents

The following sections are included in the seven-page proposal limit, per Concept submitted.

5.2.1 Cover Page (1 page)

The submission should include a cover page which includes the following:

- Project title & abstract
- Proposing organization
- Mailing address
- Contact person (name, title, phone number, e-mail address)
- Research topic addressed
- Proposed budget amount in dollars
 - Proposed project duration (projects should complete by December 31, 2021)
 - Principal investigator (name and title)
 - Additional key investigators (names and titles)

5.2.2 Proposed Research Project (5 pages)

⁶ The *Operational Procedures Guide* can be made available upon request.

Describe your proposed research project. Include information on your research approach and methods, statement of work, schedule, anticipated results, and deliverables. Provide a range or estimate of the potential number of customers affected and the potential energy/demand savings involved per customer. Explain how the proposed research will benefit Focus. Applicants are encouraged to use the allotted five pages to describe the proposed project and its relevance to Focus, rather than extensively documenting Applicants' qualifications.

5.2.3 Qualifications and Experience (1 page)

Describe the qualifications and experience of the Applicant(s) and key project personnel as they apply to the research proposed. Past project experience can be detailed in the Past Projects & Reference Contact Information section of the Focus Forward Proposal Workbook and will not be counted in the proposal page limit.

5.3 Other Submission Requirements

The following submission requirements are not included in the proposal page limit.

5.3.1 Past Projects & Reference Contact Information (complete in Focus Forward Proposal Workbook) – List related projects that have been undertaken by the Applicant and/or Subcontractors, such as the use of similar methods or the design of similar programs, that otherwise reflect the Applicant's experience and capacity to perform this research. For each project, provide a brief summary describing its title, scope, funding amount and client contact numbers. Focus may contact listed clients.

5.3.2 Conflict of Interest Disclosure – All potential Applicants should disclose any and all contractual or financial relationships with Focus Administrators, Fiscal Agents, Compliance Agents, Evaluators, SEERA members, and/or PSC staff.

If Applicant currently has a contract with the Focus Administrator, Evaluator, Fiscal Agent, Compliance Agent, SEERA or the PSC, Applicant should indicate the contract purpose, dollar value of the contract and duration of the contract.

Failure to disclose the above may result in immediate rejection and exclusion from the Focus Program. If no such relationships exist, Applicant's response should contain an affirmative response indicating no relationship exists.

5.3.3 Exceptions to Terms and Conditions (complete in Focus Forward Proposal Workbook) – Applicants should document any exceptions it has to the proposed Contract General Terms and Conditions (see Appendix D). Exceptions should be limited. To indicate exceptions, Applicant should provide proposed changes to the Contract Terms and Conditions and provide an explanation for the exception request, which will be reviewed and considered by the Focus Administrator.

5.4 Affidavit of Non-Collusion⁷

Pursuant to the *Policy Manual*, each Applicant, including the prime Applicant and all Subcontractors, should execute an Affidavit of Non-Collusion and submit it as part of the bid package. This will not count toward the 7-page limit and should be included as an Appendix to your proposal. See Appendix F for the Affidavit form.

5.5 Appendices (Excluded from 7-page limit)

The following items should be included as Appendices and are not included in the proposal page limit.

5.4.1 Project Budget (complete in Focus Forward Proposal Workbook) – Applicants should provide fixed fee budgets with payment milestones based on the formats indicated in Table 2. (described below in Section 9). Milestones should match those identified in the Applicant’s Statement of Work. For each task, Applicant should provide enough detail to support the proposed budget by Task. Focus reserves the right to modify the Applicant’s proposed budget during contract negotiations and to negotiate the final total budget for each project.

5.4.2 Letters of Commitment or Support – Applicants that rely on other organizations or businesses to do work or provide services or equipment must include a letter from that organization or business describing their commitment. Absence of letters of commitment or support will be interpreted as the applicant not having commitment/support from those parties.

5.4.3 Resumes – Submit one- to two-page resumes of all key project personnel, including those of any proposed Subcontractors. Include education and project experience that are relevant to the proposed work.

6. Concept Paper Criteria

Proposals will be reviewed by a Focus evaluation committee. Proposals that meet the requirements set forth in this RFCP will be independently evaluated by the selection committee members, who will then meet and put forth a recommended set of proposals to the PSC for final approval. Proposal selection criteria will include the items in the Table below.

Table 1: Selection Criteria

1. Relevance to Focus Goals (30 points)
<ul style="list-style-type: none"> • Potential Outcomes of Research: Proposed research addresses primary goals of the EERD program, generating insights on energy efficiency and renewable energy program design or delivery in Wisconsin. Proposal clearly identifies research objectives that address new, Wisconsin-specific questions that have not been dealt with extensively in prior research and would ultimately result in electric and/or gas savings for utility customers.
2. Research Plan (35 points)

⁷ Refer to Appendix E for the Affidavit of Non-Collusion Form

<ul style="list-style-type: none"> • Strategy and Methods: The research design, strategy and data collection methods are sound and integrate industry best practices. The proposed research is focused on customer and utility benefits. (10 points) • Understanding of Focus Programs & Challenges: Applicant demonstrates a clear understanding of Focus programs and offerings and how the proposal addresses a current need or expands knowledge in a specific sector or technology area. (25 points)
<p>3. Applicant Experience and Capabilities (25 points)</p>
<ul style="list-style-type: none"> • Qualifications and Experience: Key staff members demonstrate the appropriate experience and qualifications to successfully manage and implement the research project. Team management and organizational structure is clear and adequate for project. Applicant demonstrates past skill, competence and experience in implementing similar projects. (20 points) • Organizational Capabilities: Applicants' organization has the necessary resources, staff, systems and processes to effectively implement the proposed project. (5 points)
<p>4. Cost & Timeline (10 points)</p>
<ul style="list-style-type: none"> • Reasonable Costs and Timeline: Costs that are reasonable relative to scope of proposed research plan are within the budgetary limits defined in this RFCP. The research plan is reasonable and achievable within the approximate project timeframe of 12 months.

5.5 Concept Paper Review – Clarifications

The Focus bid evaluation team may perform clarification interviews or request clarifications. A clarification interview may be performed via phone or teleconference and will focus on clarifying the information set forth in the proposals. Applicants will not be compensated for the time spent or the costs incurred for the interview(s) or for responding to a written request for clarification.

6 Pricing

Applicants must propose a fixed fee payment structure to correspond with payment milestones in order to receive payment for the Work proposed for either, both or additional Concepts, as described in Appendix A. The total cost and schedule must be completed in Excel format and returned in Excel format using the Focus Forward Proposal Workbook⁸ located in Appendix F.

Focus will award the bid depending on the bid responses and Applicant capabilities.

The selected Focus Forward Applicant will use the defined cost categories when completing the proposed Budget Table:

⁸ Refer to Appendix F for the EERD Proposal Workbook in Excel format.

- **Technical & Customer Support:** Includes implementation, QA/QC, project management assistance, EM&V, etc.
- **Other Direct Costs (ODCs)**
- **Subcontractors:** Individuals or organizations hired for Program activities. **There can be no mark-up on any Subcontractor costs.**
- **Travel:** No reimbursement for any kind of travel expenses may be billed.

See below for an illustrative example of a proposed budget in the required format.

Table 2: SAMPLE/ Proposed Budget by Line Item by Milestone Achieved

SAMPLE ONLY Focus Forward EERD Project Table 2: Compensation by Milestone Achieved		
	Payment	Milestone
Technical & Customer Support Research 25%	\$17,500.00	Outline and Literature Review completed
Technical & Customer Support Draft 50%	\$35,000.00	Draft Paper submitted
Technical & Customer Support Final 25%	\$17,500.00	Final Product with Comments Incorporated submitted
Total	\$70,000.00	

7. Submission Checklist

Applicants should submit proposal(s) in the format outlined below, responsive to [Section 6](#), “Proposal Instructions.” A copy of this checklist should be provided with each proposal submission. The checklist will not be counted toward the maximum page limit of 7 pages, inclusive of all items below, unless otherwise specified.

- 8.1 Cover Page with Abstract and General Information
- 8.2 Proposed Research Project
 - 8.2.1 Research Question
 - 8.2.2 Research Approach and Methods
 - 8.2.3 Statement of Work
 - 8.2.4 Schedule
 - 8.2.5 Anticipated Results
 - 8.2.6 Deliverables
- 8.3 Staffing Plan, Qualifications, and Experience
 - 8.3.1 Qualifications
 - Company role (prime or Subcontractor)
 - Project tasks
 - Qualifications company brings to pilot
 - Years in operation
 - Business structure (e.g. for-profit corporation, not-for-profit organization, partnership, etc.)
 - Number of employees
 - 8.3.2 Team Structure
 - 8.3.3 Past Projects & Reference Contact Information (excluded from 7-page limit)
(complete the Focus Forward Proposal Workbook, Appendix F)
 - 8.3.4 Conflict of Interest Disclosure (excluded from 7-page limit)
 - 8.3.5 Exceptions to Terms and Conditions (not included in 7-page limit)
(complete the Focus Forward Proposal Workbook to identify exceptions, Appendix F)
- 8.4 Financial Requirements and Documentation (excluded from 7-page limit)
- 8.5 Affidavit of Non-Collusion (see Appendix E, excluded from 7-page limit)
- 8.6 Appendices (excluded from 7-page limit)
 - 8.6.1 Project Budget
(complete the Focus Forward Proposal Workbook to identify exceptions, Appendix F)
 - 8.6.2 Letters of Commitment or Support
 - 8.6.3 Resumes

8. Agreement General Terms and Conditions

Refer to this link at

https://www.focusonenergy.com/sites/default/files/aptim_pi_2020_contract_ts_cs_approved_1.10.20.pdf

9. Appendices to this RFCP

- A. Research Topics Identified by Focus on Energy for EERD Funding**
- B. Supplemental background on Focus on Energy**
- C. Policy Manual**
- D. General Terms and Agreements and Conditions of the proposed Agreement**
- E. Affidavit of Non-Collusion**
- F. Focus Forward Proposal Workbook**

Appendix A – Research Topics Identified by Focus on Energy for EERD Funding

Demand Response (DR) Ready Program Offerings

Problem:

The Focus on Energy (Focus) portfolio of offerings are currently structured to provide economic and environmental benefits to all of Wisconsin through electricity and natural gas lifecycle energy savings (LC MMBtu) and reduction of peak KW. The evolution of energy efficiency programming is well-documented, including the mass adoption of inexpensive measures, such as LED lighting, and changing policies on the state and local levels. As programs evolve, administrators are looking for additional cost-effective savings, increased customer satisfaction and grid stabilization (maintain costs, increase reliability, and optimized performance).⁹

Currently, Focus partners with 107 utilities throughout the state on traditional energy efficiency offerings, such as efficient products, HVAC upgrades and thermal improvements to new and existing buildings.

Utilities across the country currently offer demand response programs in several forms (time of use rates, direct load control program) that lower peak energy demand. At this time, Focus cannot directly implement demand response programs, per state statute;¹⁰ however, Focus views this rapid advancement as an opportunity to better position statewide programs to harvest demand savings and partner with utilities on their DR programs in the future.

As demand response and other non-wires alternatives capabilities evolve, they become increasingly valuable as a strategy that would benefit Wisconsinites. These benefits include reduced capacity costs, utility bill savings, better equipment control, new participation opportunities and improved customer-utility relationships.

In an effort to align with Focus' offerings, goals and strategy, Focus is seeking primary research and recommendations on what offerings would work best in Wisconsin to ensure the program continues to provide value to Wisconsin residents and utilities. This research should also include the necessary steps or policies needed for successful integration. Ideally, the benefits and costs of Focus' ability to integrate demand response initiatives into its traditional energy efficiency offerings should also be considered.

Estimated Number of Customers Affected:

This research would have implications for the entirety of the Focus on Energy portfolio offering which had over 120,000 residential and 6,000 non-residential estimated participants in 2018.

⁹ From ACEEE Integrated Energy Efficiency and Demand Response Programs (September 2019)
<https://aceee.org/sites/default/files/publications/researchreports/u1906.pdf>

¹⁰ <https://docs.legis.wisconsin.gov/2001/statutes/statutes/196/374>

Benefit to Focus Program:

Understanding Focus' role in the changing energy efficiency and renewable energy landscape will enable the Program to continue to deliver economic and energy-saving value to Wisconsin residents and businesses. Effective deployment of energy efficiency and demand response programming can provide cost savings to both the customer and the system as a whole by helping address load constraints less expensively than T&D investments.

Estimated Budget:

An estimated budget for this research is \$50,000 to \$70,000.

Alternative Models to Replace Residential Lighting Savings

Problem:

The majority of Focus on Energy's portfolio of electricity savings has traditionally been made up of lighting measures, 77.68% LED.¹¹ Due to widespread adoption and changing regulations, energy efficiency programs will need to identify new technologies and approaches to help Wisconsin residents and businesses save energy. Unlike the uniform savings from lighting, each program offering will need to right-size a solution to this program evolution.

Wisconsin is not unique in confronting this challenge. Focus is looking for concepts on primary research that will identify an achievable path to maintaining or increasing program savings based on the specific population and landscape characteristics of this state. Concepts relying on secondary research that can inform and/or supplement primary research will also be considered. This research should address possible measures, program designs, and actions as well as an achievable timeline for these recommendations.

Estimated Number of Customers Affected:

While screw-based lighting is primarily a residential measure, this research will likely impact single family and multifamily residential, as well as small to mid-sized businesses.

Benefit to Focus Program:

This research will inform the future growth and development of Focus and help ensure Focus is able to continue to deliver sustained energy savings that keep energy costs stable and drive economic value to customers.

Estimated Budget:

An estimated budget for this research is \$50,000 to \$75,000.

¹¹ https://focusonenergy.com/sites/default/files/WI_FOE_CY_2018_Volume_I.pdf page 18) (44.61% LED for non-residential) %'s in verified gross kWh