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CADMUS

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Acronyms

Acronym	Term
AC	Air conditioner
ACS	American Community Survey
AHRI	Air-Conditioning, Heating, & Refrigeration Institute
API	Annual Planning Incentive
BABA	Buy America, Build America Act
BPC	Building performance consultant
BPI	Building Performance Institute
C&I	Commercial and Industrial
CBO	Community-based organization
CPI	Capital Planning Incentive
CY	Calendar year
DC	Direct current
DHW	Domestic hot water
DIY	Do-it-yourself
DOA	Department of Administration
DSM	Demand-side management
ECM	Electronically commutated motor
EDA/EDR	Energy Design Assistance/Energy Design Review
eEDA	Express Energy Design Assistance
EM&V	Evaluation, measurement, and verification
EUL	Expected useful life
EV	Electric vehicle
FAQ	Frequently Asked Questions
GPM	Gallons per minute
HVAC	Heating, ventilation, and air conditioning
ISR	In-service rate
kW	Kilowatt
kWh	Kilowatt hour
LED	Light-emitting diode

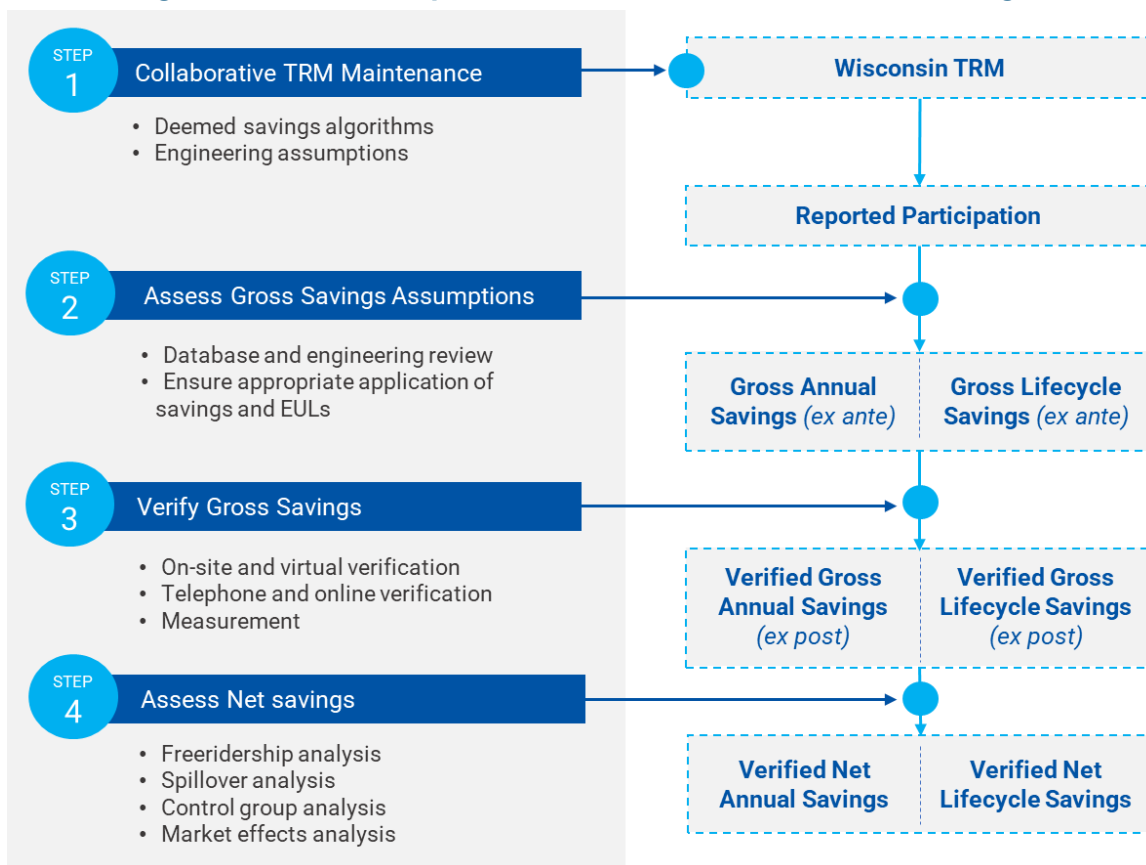
Acronym	Term
LP	Liquefied petroleum
MBh	Thousand British thermal units
MMBtu	Million British thermal units
MMID	Master measure identifier
N/A	Not applicable
NEO	Net Energy Optimizer
NPS	Net promoter score
NTG	Net-to-gross
OEI	Office of Energy Innovation
PAI	Project assessment incentive
PEM	Practical Energy Management
PEP	Product and equipment performance
PSC	Public Service Commission of Wisconsin
PV	Photovoltaic
QPL	Qualified Products List
RFP	Request for proposal
ROI	Return on investment
SEER	Seasonal energy efficiency rating
SEM	Strategic energy management
SIM	System Information Modeling
SPECTRUM	Statewide Program for Energy Customer Tracking, Resource Utilization, and Data Management
T&D	Transmission and distribution
TRC	Total resource cost test
TRM	Technical reference manual
ULT	Ultra low temperature (freezer)
VFD	Variable-frequency drive
WHEDA	Wisconsin Housing and Economic Development Authority

1. Introduction

Volume II of the Focus on Energy calendar year (CY) 2025 evaluation report presents offering-specific evaluation findings and details about the evaluation approaches and results for the residential, nonresidential, and cross-cutting offerings. This introduction presents additional information on the overall roles and responsibilities of the evaluation team as well as descriptions of standard evaluation practices and approaches the team used across multiple offering evaluations.¹

The diagram presented here, as Figure 1 in Volume II, and as Figure 2 in Volume I, is a useful summary of the steps involved in the calculation of net savings from the gross savings recorded in the offering tracking databases. In addition to these steps, there are many planning and coordination activities that are a part of the evaluation process. Following this introduction, Volume II presents offering-specific evaluation findings and more detail on evaluation approaches and results.

Figure 1. Evaluation Steps to Determine CY 2025 Gross and Net Savings



To accomplish evaluation steps 1 through 3, the evaluation team coordinates with staff from the Public Service Commission of Wisconsin (PSC), the program administrator, and program implementers to assess

¹ The evaluation team comprises Cadmus and Apex Analytics.

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the measures expected to be installed across offerings in future years. To determine priorities for additional research, the evaluation team also reviews the deemed savings or algorithms contained in the technical reference manual (TRM) and entered into the Statewide Program for Energy Customer Tracking, Resource Utilization, and Data Management (SPECTRUM), the offering tracking database.

The evaluation team prioritizes measures for evaluation, measurement, and verification (EM&V) that demonstrate the highest priority by meeting one or more of the following criteria:

- New to the offerings
- Expected to contribute an increasing share of savings
- Experienced technical or other market changes (such as increased energy codes or standards)
- There is significant uncertainty around the savings calculation (independent measurement of key assumptions is dated)

The team then applies the findings from these activities to the savings calculations summarized in the evaluation report, which ultimately end up in the TRM.

1.1. Wisconsin Focus on Energy Technical Reference Manual

The Wisconsin Focus on Energy TRM is managed collaboratively by the program administrator, program implementers, evaluation team, and PSC staff. The information in the TRM presents consensus calculations of electric and gas energy savings and electric demand reductions achieved through the installation of energy efficiency and renewable energy technologies supported by Focus on Energy offerings. The TRM is publicly available on the Focus on Energy website.²

The values presented in the TRM fall into one of two categories:

- **Deemed savings.** Specific per-unit savings (or demand reduction) the program administrator, program implementers, evaluation team, and the PSC have accepted as reliable because the measures and the uses for these measures are consistent, and sound research supports the savings achieved.
- **Savings algorithms.** The equations used for calculating savings (or demand reductions) are based on project- and measure-specific details. The TRM also makes these calculations transparent by identifying and justifying all relevant formulas, variables, and assumptions.

The TRM is also a reference guide for how an offering's stakeholders classify measures in SPECTRUM, Focus on Energy's database for tracking program data. The evaluation team updates the document annually to account for any changes to the offerings and technologies.

² Public Service Commission of Wisconsin. January 2025. Wisconsin *Focus on Energy 2025 Technical Reference Manual*. Prepared by Cadmus. https://assets.focusonenergy.com/production/inline-files/Focus_on_Energy_2023_TRM.pdf <https://assets.focusonenergy.com/production/inline-files/Focus-on-Energy-2025-TRM.pdf>

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1.2. Work Papers

Implementers prepare work papers to present the savings assumptions for new measures or, when appropriate, revisions to the savings calculations for existing measures. They submit these work papers to the administrator, who forwards them to the evaluation team and the PSC for review, comment, and approval. Once a work paper receives final approval from the PSC, the evaluation team incorporates the work paper into the next iteration of the TRM.

1.3. Standard Evaluation Methods

The evaluation team uses several standard methods across evaluation cycles to assess the impact of Focus on Energy offerings, including a tracking database review, project audits, and site inspections, which are detailed below. The individual chapters that follow specify when the evaluation team applied these or other methods during the current or previous evaluation cycles.

1.3.1. Tracking Database Review

For each offering, the evaluation team reviews the tracking database, SPECTRUM, for completeness and quality of data. The review includes the following activities:

- Download and review data for projects completed during the offering year (January 1 to December 31 for each calendar year, based on the “payment approved date” in SPECTRUM)
- Check offering totals against offering status reports generated by SPECTRUM
- Verify the presence and completeness of key data fields (savings, incentives, quantities, etc.)
- Check for duplicate entries
- Re-assign adjustment measures to original application identifications (where possible) using supplemental tracking databases from the program administrator

1.3.2. Project Audits (Engineering Desk Review)

The evaluation team reviews SPECTRUM for complete and accurate key project documentation, including the following information:

- Project applications
- Savings workbooks
- Savings calculations performed by participants or third-party contractors (if applicable)
- Energy audits or feasibility studies
- Customer metered data
- Customer billing data (monthly utility bills)
- Invoices for equipment or contracting services
- Other documentation submitted to Focus on Energy

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1.3.3. Site Inspections

For nonresidential projects selected for evaluation, the evaluation team conducts virtual or on-site inspections to verify the presence of equipment at a project site. For virtual site visits, inspection staff conduct video calls with participant facility staff during which inspectors receive a virtual tour of the project, along with video or photographic information to verify nameplate data and any necessary operating parameters. In some cases, our staff may supplement these video conversations with additional options, such as allowing the customer to upload photographs and videos. Inspection staff also work closely with the customer to ensure the process is streamlined and efficient, minimizing the burden on the customer.

For on-site inspections, inspection staff verify the presence of equipment at a project site and collect data through a variety of methods, such as installing data loggers or taking spot measurements of power usage. Inspectors may also gather data by reviewing daily operations and maintenance logs, gathering operations data from central energy management systems, and reviewing historical trend data. Staff may also ask customers to initiate trends during a site visit to collect real-time energy consumption data and then follow up with the customer several weeks later to obtain the results.

2. RESIDENTIAL PROGRAMS

This section presents the CY 2025 evaluation results for these residential programs and their offerings, by chapter.

Direct to Customer Program

- Online Marketplace offering
- Packs offering
- Income-Qualified Direct Install Thermostat Pilot

Multifamily Program

- Multifamily offering
- Energy Design Assistance/Energy Design Review offering

Residential New Construction Program

- Residential New Construction offering
- New Manufactured Homes Pilot

Trade Ally Solutions Program

- Heating and Cooling offering
- Insulation and Air Sealing offering
- Retail Smart Thermostats offering
- Tribal offering

3. Direct to Customer Program

In CY 2025, Focus on Energy’s Direct to Customer Program provided three energy-saving opportunities targeted at residential utility customers. These three offerings, described below, provided customers with reduced-cost or free energy-efficient products.

- The Online Marketplace offered discounted, efficient products through an online store.
- The Packs offering provided free packs of efficient products to residential customers.
- The Income-Qualified Direct Install Pilot offered discounted installations to qualifying customers who purchased a smart thermostat.

APTIM administered the Direct to Customer Program in CY 2025, and TechniArt, the implementer, conducted the program’s day-to-day operations. Additional details about the Direct to Customer Program offerings can be found in the *Process Evaluation* section of this chapter.

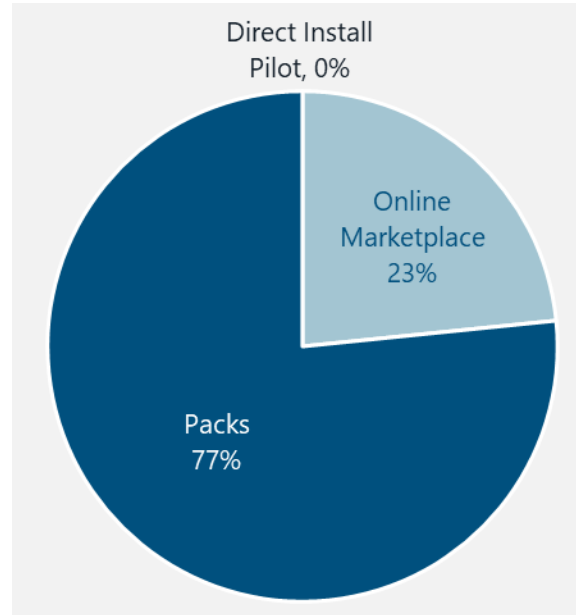
Table 1 summarizes the CY 2025 impacts for the Direct to Customer Program overall.

Table 1. CY 2025 Direct to Customer Summary

Item	Units	CY 2025
Incentive Spending	\$	\$5,917,749
Participation	Number of Participants	131,680
Verified Gross Lifecycle Savings	kWh	132,663,343
	kW Summer	2,661
	kW Winter	1,365
	Therms	29,847,734
Verified Gross Lifecycle Realization Rate	% (MMBtu)	88%
Annual Net-to-Gross (NTG) Ratio	% (MMBtu)	79%
Net Annual Savings	kWh	11,003,752
	kW Summer	2,296
	kW Winter	1,091
	Therms	2,173,794
Net Lifecycle Savings	MMBtu	2,718,866
Cost-Effectiveness	Total Resource Cost (TRC) Test: Benefit/Cost Ratio	2.66

Figure 2 shows the proportion of verified gross lifecycle MMBtu savings by offering. In CY 2025, the Packs offering accounted for the largest share of savings in the Direct to Customer Program (77%).

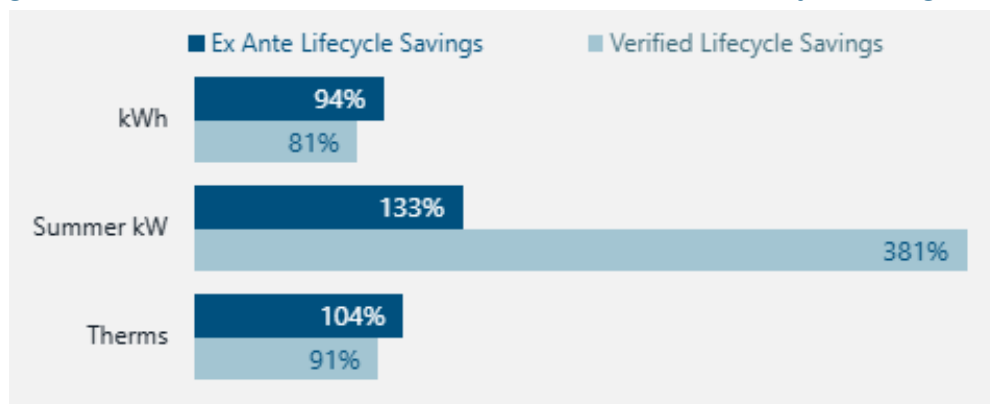
Figure 2. Allocation of CY 2025 Direct to Customer Gross Lifecycle Savings by Offering



3.1. Achievement Against Goals

Figure 3 shows the percentage of gross lifecycle savings goals achieved by the Direct to Customer Program in CY 2025. The total program did not achieve its kWh goal, exceeded its kW goal, and fell short of its therms goal in CY 2025.

Figure 3. CY 2025 Direct to Customer Achievement of Gross Lifecycle Savings Goals



100% *ex ante* gross lifecycle savings reflect the implementer’s contract goals for CY 2025.

Verified gross lifecycle savings contribute to the administrator’s portfolio-level goals.

Note: Winter kW goals were not established in CY 2025.

3.2. Impact Evaluation

This section presents the findings for the CY 2025 impact evaluation at the program level, followed by a discussion of each offering.

3.2.1. Impact Evaluation Methodology

To calculate gross verified savings, the evaluation team conducted a review of the tracking database for all offerings and measures and relied on the 2025 TRM, CY 2024 Online Marketplace, and Packs participant surveys, and previous evaluation results to calculate verified savings. The team also conducted a participant survey with CY 2025 Income-Qualified Direct Install pilot participants, but there were not enough completes to make verified gross adjustments to measures provided through this offering.

3.2.2. Verified Gross Savings Results for the Direct to Customer Program

Table 2 lists the first-year and lifecycle realization rates for CY 2025 by offering, and

Table 3 lists verified first-year and lifecycle savings. Overall, the program achieved a first-year evaluated realization rate of 87%, weighted by total (MMBtu) energy savings. The Online Marketplace kW realization rates are high due to intentional differences between *ex ante* and verified savings for smart thermostats, reflecting a mid-2025 adjustment to *ex ante* values that expected to be accounted for in the verified savings. Detailed findings for each offering, including factors affecting the realization rates, are discussed in the next sections.

Table 2. CY 2025 Direct to Customer First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Online Marketplace	100%	3,239%	182%	100%	100%	100%	100%	100%
Packs	77%	71%	83%	83%	83%	74%	86%	85%
Income-Qualified Direct Install Pilot	100%	N/A	N/A	100%	100%	100%	100%	100%
Total	89%	287%	90%	86%	87%	86%	88%	88%

Table 3. CY 2025 Direct to Customer First-Year and Total Lifecycle Verified Gross Savings

Offering	Verified First-Year Savings					Verified Lifecycle Gross Savings		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Online Marketplace	7,773,621	2,035	186	570,616	83,585	71,118,367	5,601,245	802,780
Packs	5,185,775	609	1,178	2,193,611	237,055	60,976,698	24,215,097	2,629,562
Income-Qualified Direct Install Pilot	63,142	17	2	3,488	564	568,278	31,392	5,078
Total	13,022,538	2,661	1,365	2,767,715	321,204	132,663,343	29,847,734	3,437,421

Online Marketplace: Verified Gross Savings Results

The evaluation team used 2025 TRM, recently approved work papers, and results of the CY 2024 Online Marketplace participant survey to assess savings from measures sold through the Online Marketplace in CY 2025. Using CY 2025 participation data, the team developed weighted average unit savings that reflect the distribution of single-family and multifamily participation. Table 4 shows the *ex ante* and verified savings for the offering. The offering achieved a lifecycle MMBtu realization rate of 100%.

Table 4. CY 2025 Online Marketplace *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	7,770,319	63	102	570,381	7,773,621	2,035	186	570,616
Lifecycle Gross Savings	71,074,353	63	102	5,598,341	71,118,367	2,035	186	5,601,245

Tracking Database Review

The evaluation team reviewed the tracking database of all measures sold through the Online Marketplace and found that the data were generally clean and in good order.

In-Service Rates

To account for measures installed and in use by participants, the evaluation team applied in-service rates (ISRs) to gross savings. The team applied the same ISRs from the CY 2024 Online Marketplace participant survey to all measures except the domestic hot water (DHW) temperature turndown card, which had low participation. For this measure, the team applied the ISR from the CY 2024 Packs survey.

Table 5 shows the *ex ante* and verified lifetime ISRs used in the CY 2025 impact evaluation, along with the sources for the verified ISRs.

Table 5. CY 2025 Online Marketplace ISRs by Measure

MMID	Measure Name	<i>Ex Ante</i> ISR	Verified ISR	Verified ISR Source
4917	Advanced Power Strip, Tier 1	93%	86%	2024 Online Marketplace Participant Survey
4918	Advanced Power Strip, Tier 2	70%	86%	2024 Online Marketplace Participant Survey
5043, 4911	Showerhead	77%	83%	2024 Online Marketplace Participant Survey
5186, 5184	ShowerStart	78%	80%	2024 Online Marketplace Participant Survey
4409, 4910	Faucet Aerator	82%	75%	2024 Online Marketplace Participant Survey
5569	Insulation, DHW Pipe, Online Marketplace	35%	83%	2024 Online Marketplace Participant Survey
5571	DHW, Temperature Turndown Card, Online Marketplace	16%	36%	2024 Packs Participant Survey

MMID	Measure Name	Ex Ante ISR	Verified ISR	Verified ISR Source
5401, 5402, 5403	Room Air Cleaner	100%	100%	2024 Online Marketplace Participant Survey
5567	Weatherstripping, Door Sweep	50%	66%	2024 Online Marketplace Participant Survey
5568	Weatherstripping, Door	50%	43%	2024 Online Marketplace Participant Survey
5570	Weatherstripping, Window	50%	47%	2024 Online Marketplace Participant Survey
5573	Outlet Gaskets	50%	55%	2024 Online Marketplace Participant Survey
5572	Deluxe Window Film	50%	71%	2024 Online Marketplace Participant Survey
10053, 10052	Smart Thermostat	100%	100%	Deemed savings based on billing analysis include ISR

Smart Thermostats

The Online Marketplace reported savings for two smart thermostat measures in CY 2025. One of the smart thermostats, new to this offering in CY 2025, was a Mysa baseboard heating thermostat (MMID 10053). For both thermostat measures, *ex ante* savings calculations relied on deemed savings from the 2025 TRM, which did not include demand (kW) savings. The evaluation team followed work paper W0314, which was approved after the 2025 TRM was published and included deemed winter kW and summer kW savings. Because *ex ante* reported savings did not include summer or winter demand savings for thermostats, the overall program had realization rates over 100% (3,239% for summer kW, and 182% or winter kW). Table 6 lists first-year measure-level realization rates for the CY 2025 smart thermostat measures.

Table 6. CY 2025 Smart Thermostat First-Year Realization Rates

Measure Name, MMID	First-Year Realization Rate				
	kWh	kW Summer	kW Winter	therms	MMBtu
Smart Thermostat, Electric Only, 10053	100%	N/A	N/A	N/A	N/A
Smart Thermostat, Gas and Electric, 10052	100%	N/A	N/A	100%	100%

Aeration and Showerhead Measures

Ex ante savings for thermostatic shutoff valves with showerheads applied deemed savings values from the 2025 TRM; however, they did not always apply savings for the correct delivery channel. For some thermostatic shutoff valves with showerheads, *ex ante* applied retail pop-up deemed savings from the 2025 TRM instead of online marketplace savings. This resulted in a measure-level MMBtu realization rate of 98%. The evaluation team applied savings from only the 2025 TRM and from the 2024 Online Marketplace participant survey ISRs, resulting in realization rates very close to or at 100%.

Table 7 lists first-year measure-level realization rates for the CY 2025 aerator, showerhead, and thermostatic shutoff valve measures.

Table 7. CY 2025 Aeration and Showerhead First-Year Realization Rates

Measure Name, MMID	First-Year Realization Rate				
	kWh	kW Summer	kW Winter	therms	MMBtu
Faucet Aerator, Bathroom, 1.0 GPM, 4909	99%	99%	100%	100%	99%
Faucet Aerator, Kitchen, 1.5 GPM, 4910	99%	99%	99%	99%	99%
Showerhead, Handheld, 1.5 GPM, 5043	100%	100%	100%	100%	100%
Showerhead, Upgraded, 1.5 GPM, 4911	100%	100%	100%	100%	100%
Thermostatic Shutoff Valve with 1.5 GPM Showerhead, 5186	98%	96%	100%	98%	98%
Thermostatic Shutoff Valve, 5184	100%	100%	100%	100%	100%

Weatherization Measures

In CY 2023, Focus on Energy added four weatherization measures to the Online Marketplace: deluxe window film, outlet gaskets, window weatherstripping, and door weatherstripping. In CY 2025, the evaluation team followed the 2025 TRM for these measures, which used updated ISRs from the 2024 participation survey. For some window film units, *ex ante* savings applied were deemed savings for Window Film (MMID 10167) instead of Deluxe Window Film (MMID 5572), resulting in a measure-level MMBtu realization rate of 103%.

For some door sweeps, outlet gaskets, door weatherstripping, and window weatherstripping, *ex ante* calculations followed the guidance in work paper W0309, published before the 2025 TRM, to assess these measures, resulting in realization rates that slightly deviated from 100%. Table 8 lists first-year measure-level realization rates for the CY 2025 weatherization measures.

Table 8. CY 2025 Weatherization First-Year Realization Rates

Measure Name, MMID	First-Year Realization Rate				
	kWh	kW Summer	kW Winter	therms	MMBtu
Deluxe Window Film, 5572	104%	N/A	104%	103%	103%
Outlet Gaskets, 5573	101%	N/A	N/A	101%	101%
Weather Stripping, Door Sweep, 5567	101%	N/A	100%	101%	101%
Weather Stripping, Door, 5568	100%	N/A	100%	100%	100%
Weather Stripping, Window, 5570	99%	N/A	100%	99%	99%

Packs: Verified Gross Savings Results

The evaluation team applied deemed savings from the 2025 TRM and ISRs from the CY 2024 Packs participant surveys to measures rebated through the Packs offering. Using actual CY 2025 participation data, the team developed weighted average unit savings that reflect the distribution of single-family and multifamily participation. Table 9 shows the *ex ante* and verified savings for the offering.

Table 9. CY 2025 Packs *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	6,778,241	863	1,419	2,637,573	5,185,775	609	1,178	2,193,611
Lifecycle Gross Savings	81,906,812	863	1,419	28,245,917	60,976,698	609	1,178	24,215,097

Tracking Database Review

The evaluation team conducted a database review of all measures distributed through the Packs offering in CY 2025. The team generally found the tracking data to be clean and in good order.

Packs

In CY 2025, Focus on Energy continued using Packs-based MMIDs and configurations, which were first introduced in CY 2024. The evaluation team based verified savings for these MMID measures on the 2025 TRM and work paper W0311, which was approved after the 2025 TRM was published. Table 10 lists sources the team used to calculate verified savings for MMIDs in the Packs offering.

Table 10. CY 2025 Packs Measure Verified Savings Sources

MMID	Pack Name	Verified Savings Source	Verified ISR Source
10057	Fixed Showerhead Pack (Focus on Showers)	2025 TRM and CY 2025 Work paper	2024 Packs Participant Survey
10058	Handheld Showerhead Pack (Focus on Baths)	2025 TRM and CY 2025 Work paper	2024 Packs Participant Survey
10059	Weatherization Pack (Focus on Comfort)	2025 TRM and CY 2025 Work paper	2024 Packs Participant Survey

For all CY 2025 packs, *ex ante* savings calculations relied on deemed savings from the 2025 work paper W0311, which mistakenly applied Online Marketplace ISRs to pack measure savings. For verified savings, the evaluation team applied measure-level deemed savings from the 2025 TRM and ISRs from the CY 2024 Packs participant survey. Differences between *ex ante* and verified ISR sources resulted in realization rates below 100%.

Table 11 Compares *ex ante* and verified ISRs by pack and measure.

Table 11. CY 2025 Pack ISRs by Measure

Pack	Measure Name	<i>Ex Ante</i> ISR	Verified ISR
Focus on Showers	Insulation, DHW Pipe, Pack-based	83%	50%
	Upgraded Showerhead, 1.5 GPM, Pack-based	71%	70%
	DHW, Temperature Turndown, Pack-based	36%	20%
Focus on Baths	Insulation, DHW Pipe, Pack-based	83%	53%
	Handheld Showerhead, 1.5 GPM, Pack-based	72%	59%
	DHW, Temperature Turndown, Pack-based	36%	21%

Pack	Measure Name	Ex Ante ISR	Verified ISR
Focus on Comfort	Door Sweep	66%	53%
	Door Weatherstripping	43%	47%
	Window Weatherstripping	54%	43%
	Outlet Gasket	48%	42%
	Switch Gasket	55%	42%
	Window Film Insulation	71%	59%
	DHW, Temperature Turndown, Pack-based	36%	18%

Table 12 lists first-year realization rates for packs delivered through the Packs offering.

Table 12. CY 2025 Packs First-Year Realization Rates

Measure Name, MMID	First-Year Realization Rate				
	kWh	kW Summer	kW Winter	therms	MMBtu
Fixed Showerhead Pack, 10057	76%	72%	86%	77%	77%
Handheld Showerhead Pack, 10058	71%	69%	76%	72%	72%
Weatherization Pack, 10059	88%	67%	88%	87%	87%
Total	77%	71%	83%	83%	83%

Income-Qualified Direct Install: Verified Gross Savings Results

In CY 2025, Focus on Energy launched a new Income-Qualified Direct Install Pilot. Through this pilot, income-qualified customers can purchase and schedule installation services for a discounted smart thermostat through the Online Marketplace. The pilot included two types of thermostat measures in CY 2025: electric-only (MMID 10053) and gas and electric (MMID 10052). The evaluation team followed work paper W0314, which was approved after the 2025 TRM was published and included deemed winter kW and summer kW savings. *Ex ante* calculations relied on the 2025 TRM, which did not include winter kW and summer kW savings. Table 13 shows the *ex ante* and verified savings for the offering.

Table 13. CY 2025 Income-Qualified Direct Install Ex Ante and Verified Gross Savings

	Ex Ante Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	63,142	0	0	3,488	63,142	17	2	3,488
Lifecycle Gross Savings	568,278	0	0	31,392	568,278	17	2	31,392

3.2.3. Verified Net Savings Results for Direct to Customer Program

During the CY 2024 evaluation, the team used participant surveys to determine NTG ratios for the Online Marketplace and Packs offerings. In CY 2025, the team applied the NTG ratios determined during the CY 2024 evaluation to assess net savings. Detailed results for the NTG analysis during the CY 2024 evaluation can be found in Volume II of the *CY 2024 Wisconsin Focus on Energy Evaluation Report*.

Table 14 shows the weighted-average NTG ratio by offering, as well as the total first-year gross and net savings. The evaluation team calculated an overall NTG estimate of 79% for the program in CY 2025.

Table 14. CY 2025 Direct to Customer First-Year Net Savings and NTG

Offering	First-Year Gross Verified Savings (MMBtu)	First-Year Net Savings (MMBtu)	NTG Ratio
Online Marketplace	83,585	72,894	87%
Packs	237,055	181,466	77%
Income-Qualified Direct Install Pilot	564	564	100%
Total	321,204	254,924	79%

3.3. Process Evaluation

This section discusses process evaluation activities conducted in CY 2025 for the Direct-to-Customer Program.

3.3.1. Process Evaluation Methodology

Focus on Energy made minimal adjustments to the two core Direct to Customer Program offerings in CY 2025. Program changes included adding Mysa baseboard thermostats to the Online Marketplace and adding an Income-Qualified Direct Install Pilot. There was insufficient participation from Mysa thermostats to conduct a process evaluation in CY 2025. Therefore, the evaluation team’s CY 2025 process evaluation activities focused on the new Income-Qualified Direct Install pilot and assessed customer satisfaction in the two core offerings.

Table 15 lists the data collection activities and sample sizes for the Direct to Customer Program process evaluation. Descriptions of process evaluation activities and discussions of findings are provided below.

Table 15. CY 2025 Direct to Customer Process Evaluation Activities and Sample Sizes

Activity	Online Marketplace	Packs	Income-Qualified Direct Install	Total
Implementation Plan Review and Program Staff Interviews	✓	✓	✓	N/A
Participant Survey	0	0	21	21
Customer Satisfaction Survey	1,236	1,416	0	2,652

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Implementation Plan Review and Program Staff Interviews

The evaluation team reviewed the Direct to Customer Program implementation plan and conducted interviews with program staff to understand how it operated in CY 2025. The implementer developed the implementation plan to document programmatic details, such as eligible measures, targeted participants, and delivery channels, and to illustrate how the program design generates short- and long-term energy-saving impacts. The team conducted staff interviews to explore research interests, identify any program changes since the beginning of the year, and address any gaps in the team’s understanding of program details.

Participant Surveys

In February 2026, the evaluation team contacted Income-Qualified Direct Install participants who had participated in the CY 2025 pilot. The survey asked participants about their awareness of Focus on Energy programs; motivation for participating; satisfaction with program measures, measure installation, and program staff; and energy-saving actions and habits. Due to limited participation, the team sent the survey to all 103 participants, collecting 17 completed and four partially completed surveys.

Table 16. CY 2025 Income-Qualified Direct Install Survey Responses

Participant Type	Population Size	Complete Responses	Partial Responses	Response Rate
Thermostat Only	77	13	2	19%
Thermostat and Direct Install	26	4	2	23%
Total	103	17	4	20%

Ongoing Customer Satisfaction Surveys

Throughout CY 2025, the administrator emailed Direct to Customer participants links to the web-based satisfaction surveys. There were two objectives for these satisfaction surveys:

- Understand customer satisfaction on an ongoing basis and respond to any changes in satisfaction before the end of the annual reporting schedule
- Help to facilitate timely follow-up with customers to clarify and address service concerns

Using contact information stored in SPECTRUM, the administrator ran web-based satisfaction surveys throughout the year for CY 2025 participants. The survey covered several topics, including overall satisfaction, satisfaction with program staff and trade allies, and the likelihood of recommending Focus on Energy.

3.3.2. Design and Delivery

This section describes the design and delivery of the Direct to Customer offerings in CY 2025.

Online Marketplace Offering

The Online Marketplace is an online shopping platform where residential customers can purchase energy-efficient products at a discounted price. Many measures available through the Online Marketplace did not change between CY 2024 and CY 2025; however, some instant rebates changed, and thermostatic shut-off

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valves were added to the offering. The implementer maintained the Online Marketplace platform in CY 2025 and fulfilled and delivered Online Marketplace orders within 15 days of purchase. Table 17 shows the energy-efficient products and instant rebates available through the Online Marketplace during CY 2025.

Table 17. CY 2025 Online Marketplace Products and Instant Rebate

Measure	Instant Rebate
Smart Thermostats	\$50
Advanced Power Strips	Tier 1: \$10 Tier 2: \$20
Low-Flow Showerheads	\$6-\$15, varies by model
Faucet Aerators	\$2-\$3, varies by model
Air Purifier	\$15-\$25, varies by model
Door Weatherstripping	\$8
Door Sweep	\$5
Pipe Insulation Wrap	\$8
Switch/Outlet Gaskets	\$0.50
Water Temperature Gauge	\$0.25
Window Film Insulation	\$1
Window V-seal Weatherstripping	\$3.65
Thermostatic Shut-off Valve	\$10

Income-Qualified Direct Install Pilot

The Income-Qualified Direct Install Pilot offered income-qualified customers the option to purchase a discounted smart thermostat through an online portal and schedule installation of their rebated smart thermostat with a program contractor at a discounted rate. The pilot targeted income-qualified customers because they were an emerging customer segment of interest in the residential portfolio that was not previously targeted by Direct to Customer offerings. Specifically, the pilot targeted customers of the Alliant Energy Low Income-Home Energy Assistance Program. The pilot was operated by Resource Innovations and used an independent, co-branded online portal available only to customers targeted by the pilot. The pilot offered customers the option to have their thermostat installed by a qualified contractor for a reduced fee and included an optional quiz to determine thermostat compatibility.

Packs Offering

Through the Packs offering, single-family and multifamily customers can order free packs containing an assortment of energy-efficient measures. As in CY 2024, three packs are available through this offering: Focus on Showers, Focus on Baths, and Focus on Comfort

In CY 2025, customers could request a free pack through Focus on Energy’s online web portal or call center. TechniArt processed and shipped pack orders within four to six weeks of receipt of the request.

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Table 18 shows the number of measures in the three energy-saving packs delivered in CY 2025.

Table 18. CY 2025 Packs Offering Contents by Pack Type

Measure	Focus on Comfort	Focus on Showers	Focus on Baths
60W Equivalent A19 LEDs ^a	2	2	-
Switch and Outlet Gaskets	10	-	-
Dusk-to-Dawn LED Night-Lights ^a	1	1	1
Self-Adhesive Door Sweep	1	-	-
17-foot Rolls of Door Weatherstripping	2	-	-
Window Film Insulation Kit	1	-	-
Hot Water Temperature Card	1	1	1
High-Efficiency Showerhead	-	1	-
High-Efficiency Handheld Showerhead	-	-	1
15-foot Pipe Insulation Wrap	-	1	1

^a Savings for LEDs were discontinued after June 30, 2023, in accordance with the U.S. Department of Energy's ruling that all general service lamps must meet a 45 lumens per watt threshold by June 30, 2023. The program continued to distribute LEDs through the Packs offering to promote customer satisfaction; however, the program did not claim savings for those measures.

3.3.3. Income-Qualified Direct Install Survey Findings

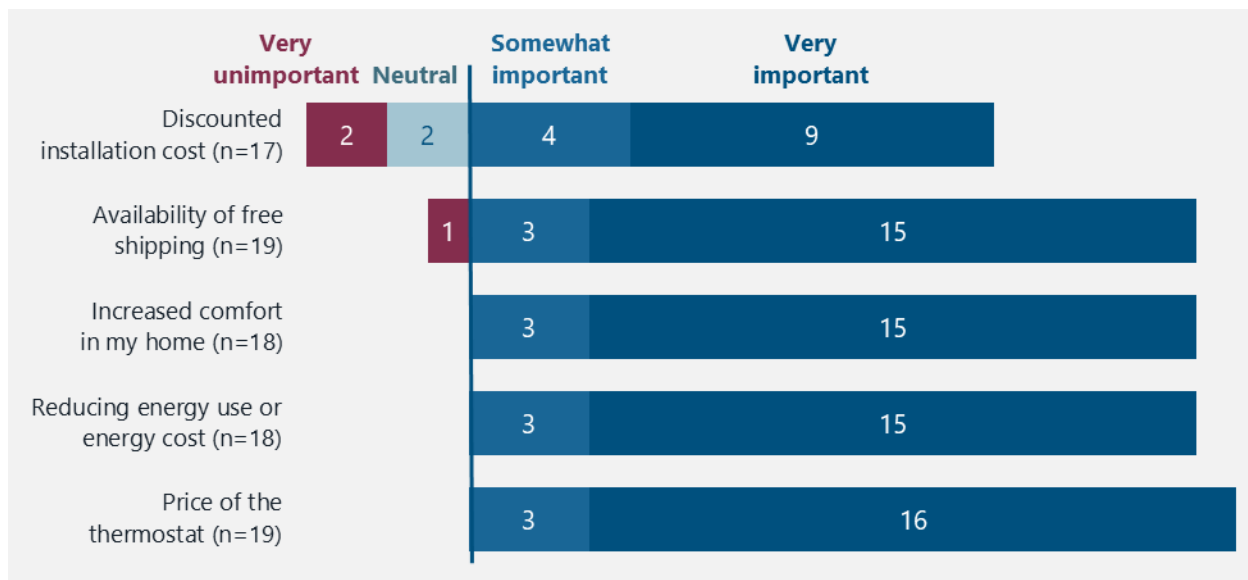
The following sections summarize findings from the CY 2025 Income-Qualified Direct Install Smart Thermostat Pilot participant survey.

Awareness and Motivation

The survey asked Income-Qualified Direct Install participants where they heard about the Income-Qualified Direct Install Pilot. Twelve of nineteen respondents heard about the pilot via email, while seven heard about it via direct mail, a brochure, or a postcard. When asked to rate the helpfulness of the communication they received, nearly all, 17 of 18 participants who responded, said the communication they received was very helpful or somewhat helpful. Almost all respondents (14 of 18) were not aware that Focus on Energy offered discounted thermostats before hearing about the pilot.

Income-Qualified Direct Install respondents were also asked about the importance of certain factors in their decision to purchase the smart thermostat. As shown in Figure 4, participants gave the most *very important* ratings to increasing home comfort, reducing energy use or cost, the price of the thermostats, and free shipping. Free shipping and the discounted installation cost were the only factors that some customers rated as *very unimportant*.

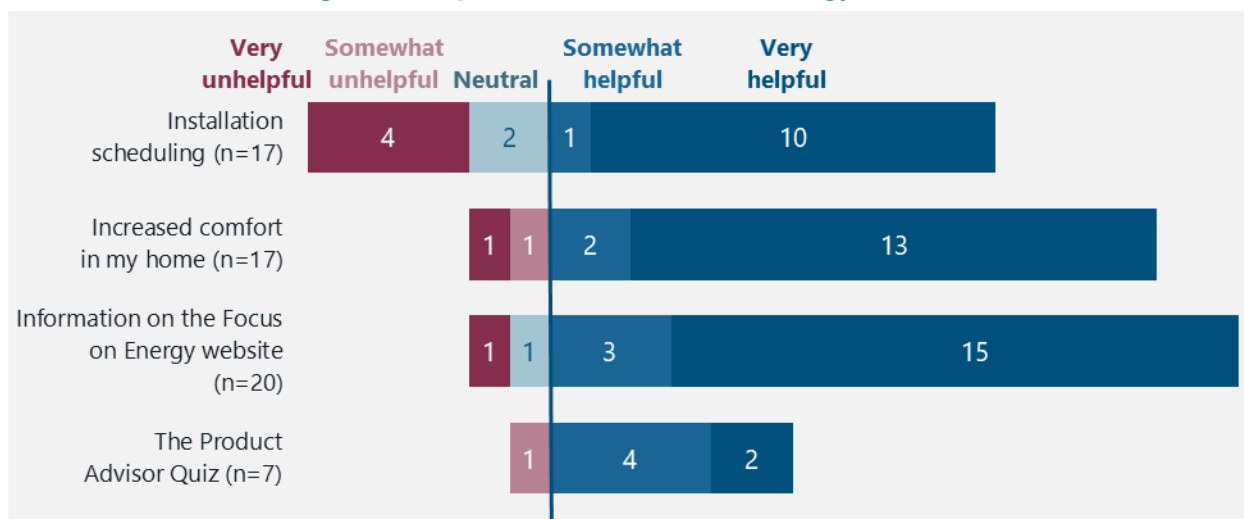
Figure 4. Motivating Factors



Source: CY 2025 Focus on Energy Income-Qualified Direct Install Survey: “How important were each of the five factors in your decision to purchase your smart thermostat?”

Participants were also asked about the helpfulness of various aspects of the Focus on Energy website. As shown in Figure 5, participants were mostly likely to find general information and information about increased comfort *somewhat* or *very helpful*. Participants were most likely to say the installation schedule was *very unhelpful*. All but one respondent said the process of using the Focus on Energy website to order their thermostat was somewhat or very easy.

Figure 5. Helpfulness of the Focus on Energy Website



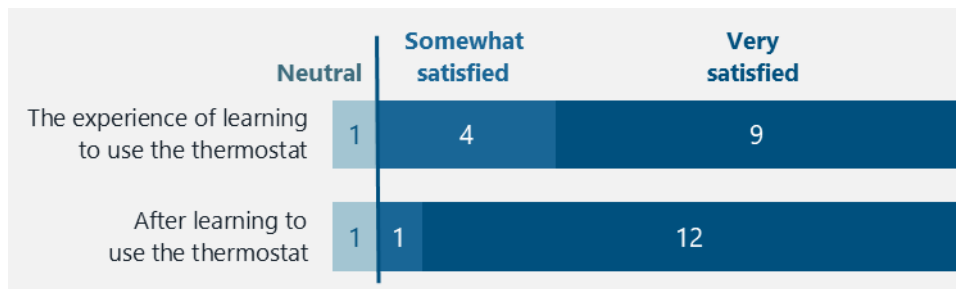
Source: CY 2025 Focus on Energy Online Marketplace Participant Survey: “How helpful were each of the following Focus on Website features?”

Measure and Contractor Satisfaction

The survey asked participants for specific feedback on their satisfaction with the thermostat, experience learning to use the new thermostat, the installation process, and the contractor who installed it.

As shown in Figure 6, nine out of 14 participants were *very satisfied* with their experience learning to use their new thermostat, and 12 out of 14 were *very satisfied* with their thermostat after learning to use it.

Figure 6. Satisfaction with the New Thermostat, During and After Learning to Use it



Source: CY 2025 Focus on Energy Income-Qualified Direct Install Survey: “Overall, how would you rate the experience of learning to use your new thermostat?” (n=14) and “Overall, how would you rate the experience with your new thermostat once you had learned to use it?” (n=14)

Of the 15 respondents who did not have their thermostat installed by a program contractor, 11 installed it themselves, one hired a contractor, and one had their landlord install it. All but one respondent found the thermostat was easy to install.

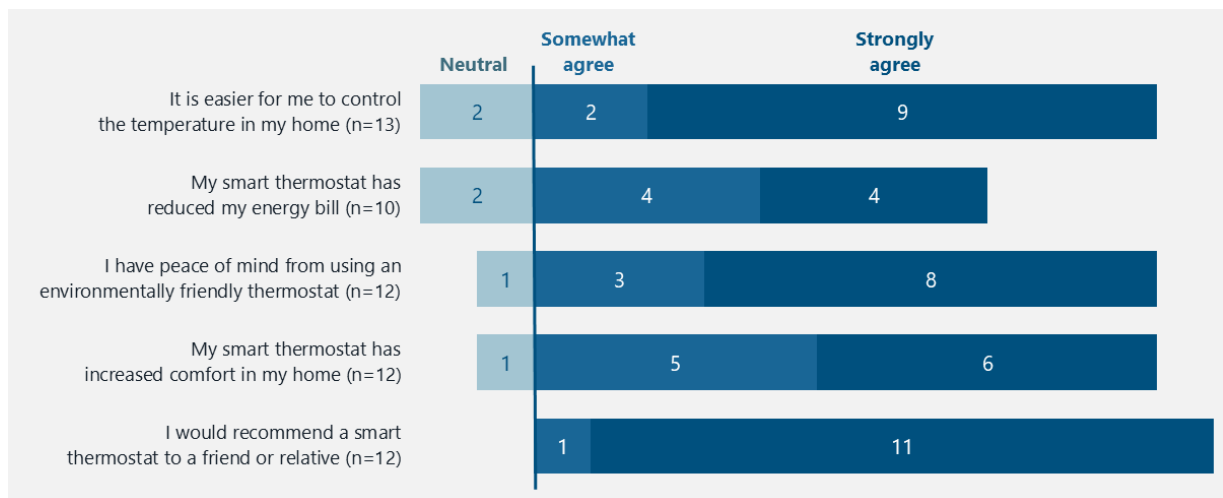
Of the four respondents who had their new thermostat installed by a program contractor, three reported their satisfaction levels. Two indicated they were *very satisfied* with their contractor. The third respondent rated their satisfaction as *somewhat dissatisfied*, explaining that their initial contractor was “okay” and seemed to have installed the thermostat correctly, they were told by a manufacturer that it must be

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reinstalled, and they had a negative experience with the second contractor. When participants who had scheduled their installation through the program were asked whether this option affected how soon they could install the thermostat, one respondent said that communicating through Focus on Energy made it less timely/more complex.

Respondents were asked whether they agree with various positive statements about their new thermostat. As shown in Figure 7, nearly all respondents agreed with all of the statements, with only one or two respondents reporting neutral agreement on four of the statements. All respondents agreed that they would recommend a smart thermostat to friends/relatives. No respondents disagreed with any of the statements.

Figure 7. Level of Satisfaction with the Thermostat



Source: CY 2025 Focus on Energy Income-Qualified Direct Install Survey: “How much do you agree with each of the following statements?” Demand Response Opportunities

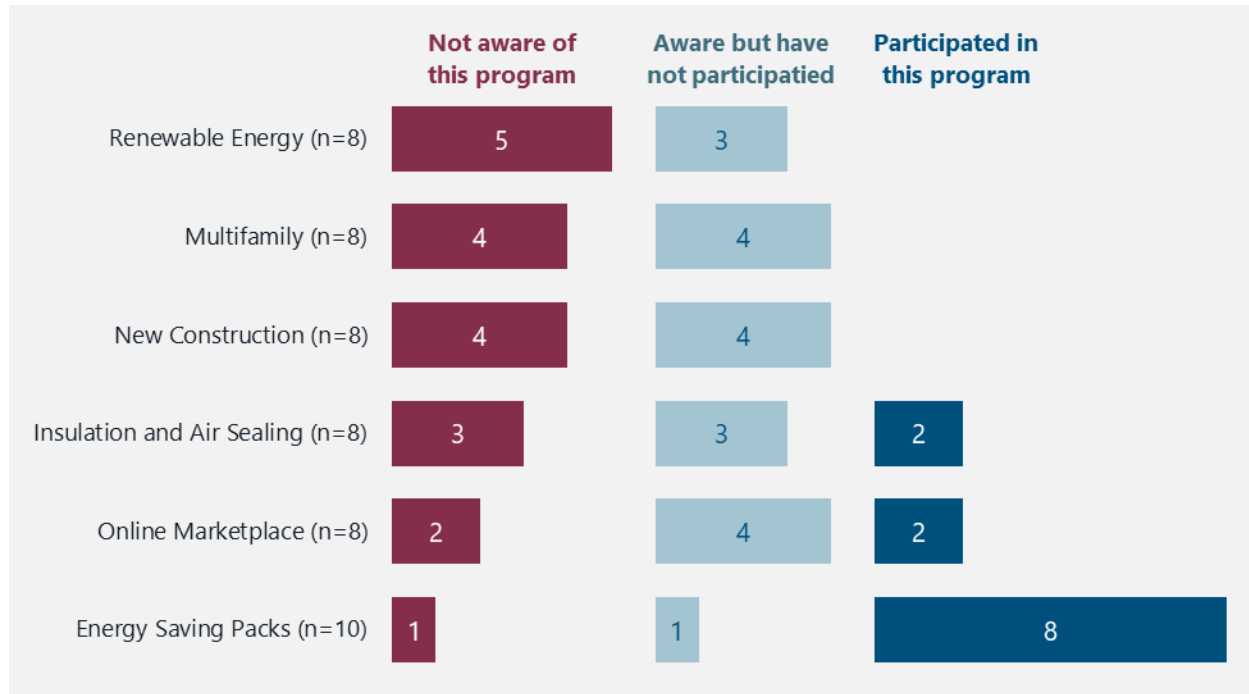
The survey also gauged participant interest in demand response opportunities. Eight of eighteen respondents said they were aware of demand response opportunities, and two of seven respondents indicated they had already participated in one. The survey also asked whether respondents would be interested in demand response opportunities, specifically, cheaper electric rates during off-peak periods and bill credits for shifting electric loads. Of the nine participants who responded to the question, five were interested in both opportunities, two were only interested in cheaper rates during peak times, and two were uninterested in both.

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Focus on Energy Program Awareness

When asked about their awareness of and participation in Focus on Energy programs and rebates, the highest levels were in the Energy Saving Packs Program. Respondents were least aware of the Renewable Rewards Program. Figure 8 shows the full breakdown of respondents' awareness of and participation in Focus programs.

Figure 8. Focus on Energy Program Awareness (Income-Qualified Direct Install)

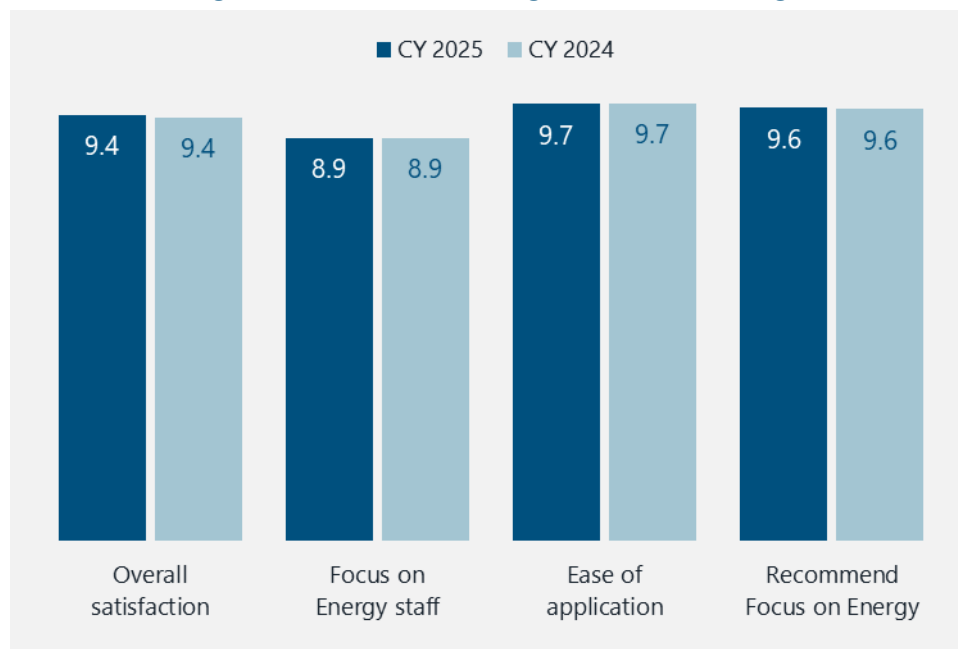


Source: CY 2025 Focus on Energy Income-Qualified Direct Install Participant Survey: “For the Focus on Energy programs and rebates listed below, please indicate which ones you are aware of and which ones you have participated in. Select all that apply.”

3.3.4. Ongoing Participant Satisfaction Surveys

Throughout CY 2025, the program administrator invited Direct to Customer participants in the Packs and Online Marketplace offerings to complete a web-based satisfaction survey. Respondents answered questions related to satisfaction and the likelihood to recommend Focus on Energy on a scale of 0 to 10, where 10 indicated the highest degree of satisfaction or likelihood to recommend and 0 the lowest.³ CY 2025 Packs participants gave the offerings they participated in an average overall satisfaction rating of 9.4, which was the same as their ratings from the previous two years. From CY 2024 to CY 2025, participants gave consistently high average satisfaction ratings for the ease of ordering packs. Interactions with Focus on Energy staff received the lowest average satisfaction ratings for the Packs offering (8.9), but only 7% of survey respondents (100 out of 1,416) offered ratings for staff, since most offering participants do not have contact with staff. Figure 9 shows a breakdown of respondents’ satisfaction ratings for the Packs offering.

Figure 9. Satisfaction Ratings for Packs Offering



Source: Packs Participant Satisfaction Survey Questions. “Overall, how satisfied are you with your most recent experience with Focus on Energy?” (CY 2025; n=1,406; CY 2024 n=1,556). “How satisfied are you with the Focus on Energy staff member who assisted you with your order?”⁴ (CY 2025 n=100; CY 2024 n=99). “How satisfied are you with the ease of ordering your pack from Focus on Energy?” (CY 2025 n=1,393; CY 2024 n=1,555). “How likely are you to recommend Focus on Energy to others?” (CY 2025 n=1,397; CY 2024 n=1,553). None of the differences between years is statistically significant.

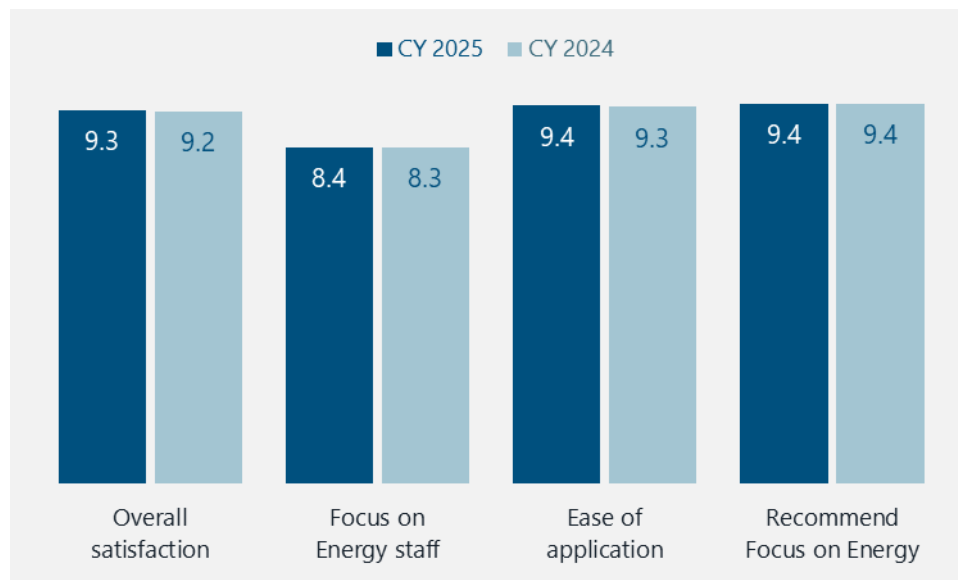
³ The number of participants who completed a survey does not always match the number of responses for each question, as some participants skipped or did not know answers to questions.

⁴ All surveys gave respondents the opportunity to rate staff, though they were not required to give a rating since their participation in an offering may not have involved any contact with staff.

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Online Marketplace participants gave the offering they participated in an average overall satisfaction rating of 9.3 in CY 2025, which was statistically equivalent to the average rating they gave the program in CY 2024 (9.2). From CY 2024 to CY 2025, participants gave consistently high average satisfaction ratings for the ease of ordering from the Online Marketplace. The lowest average rating for any aspect of the program in CY 2024 was 8.4 for Focus on Energy staff, which is consistent with CY 2024 (8.3). However, only 9% of Online Marketplace respondents (114 out of 1,236) provided ratings for Focus on Energy staff, as participants typically do not have contact with Focus on Energy staff. Figure 10 shows a breakdown of respondents' ratings for the Online Marketplace offering.

Figure 10. Satisfaction Ratings for Online Marketplace



Source: Online Marketplace Participant Satisfaction Survey Questions. "Overall, how satisfied are you with your most recent experience with Focus on Energy?" (CY 2025 n=1,226; CY 2024 n=1,446). "How satisfied are you with the Focus on Energy staff member who assisted you with your order?"⁵ (CY 2025 n=114; CY 2024 n=151). "How satisfied are you with the ease of shopping for products at the Online Marketplace?" (CY 2025 n=1,214; CY 2024 n=1,439). "How likely are you to recommend Focus on Energy to others?" (CY 2025 n=1,223; CY 2024 n=1,437). None of the differences between years is statistically significant.

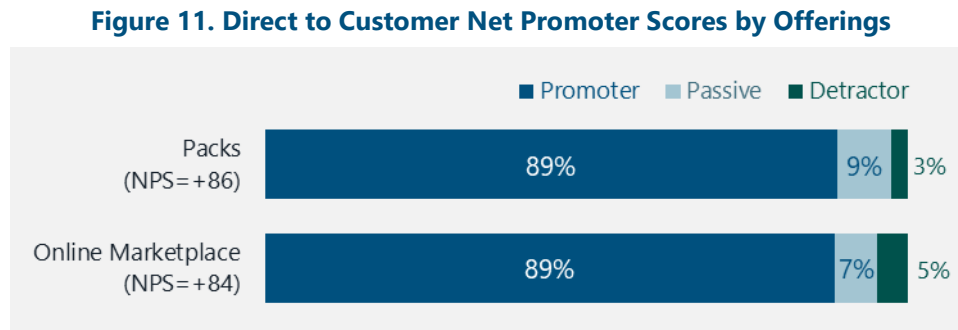
Net Promoter Score

CY 2025 Packs and Online Marketplace participants gave consistently high ratings for their likelihood to recommend Focus on Energy, averaging 9.6 for Packs and 9.4 for Online Marketplace. Using these survey data, the evaluation team calculated a net promoter score (NPS) based on customers' likelihood to recommend Focus on Energy. The NPS is expressed as an absolute number between -100 and +100, representing the difference between the percentage of promoters (respondents giving a rating of 9 or 10) and detractors (respondents giving a rating of 0 to 6). The Net Promoter Scores remained consistent from

⁵ All surveys gave respondents the opportunity to rate staff, though they were not required to give a rating since their participation in an offering may not have involved any contact with staff.

CY 2024 to CY 2025. The Packs offering received an NPS of +86 in CY 2025, similar to +88 in CY 2024. The NPS for the Online Marketplace was +84 in CY 2025, identical to +84 in CY 2024.

Figure 11 shows the distribution of promoters and detractors by offering.

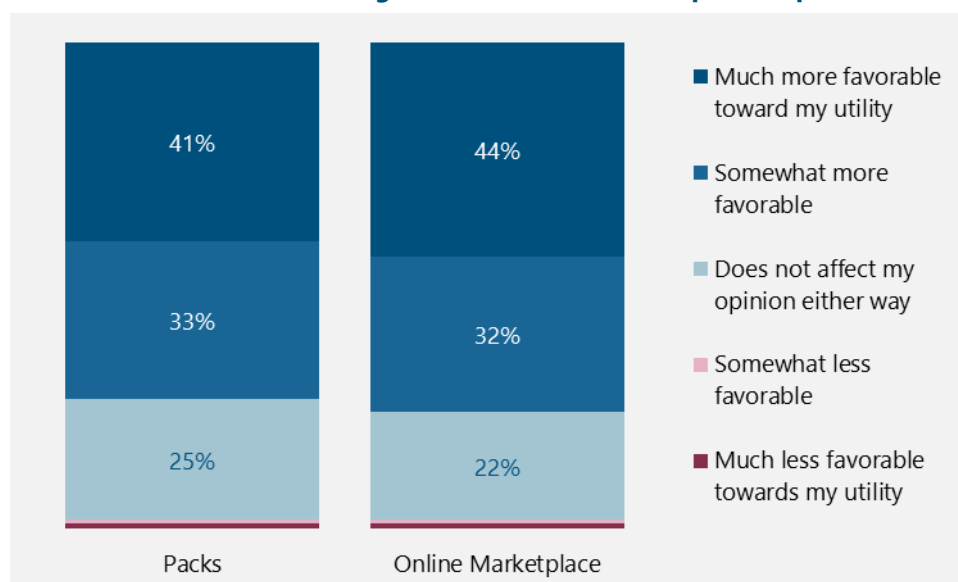


Source: Packs and Online Marketplace Participant Satisfaction Survey Question: “How likely are you to recommend Focus on Energy to others?” (Packs n=1,397; Online Marketplace n=1,223).

Most respondents were aware that the offering they participated in was delivered in partnership with their local utility before receiving the satisfaction survey. Eighty percent (n=1,379) of the Packs survey respondents were aware of the utility partnership in CY 2025, and 82% (n=1,211) of the Online Marketplace survey respondents were aware, comparable to CY 2024 (80% and 83%, respectively).

Surveys asked participants if Focus on Energy offerings affected their opinion of their utilities (Figure 12), and 74% of Packs and 76% of Online Marketplace respondents reported that their opinion had become *much more favorable* or *somewhat more favorable*. Very few respondents indicated that their opinion of the utility became less favorable; for both offerings, only 2% reported their opinion as *much less favorable* or *somewhat less favorable*.

Figure 12. Direct to Customer Program Influence on Participants’ Opinions of Utilities



Source: CY 2025 Packs and Online Marketplace Participant Satisfaction Survey Question: “How have these offerings affected your opinion of your energy utility, if at all?” (Packs n=1,294, Online Marketplace n=1,144). Note: Unlabeled segments represent 2% or less of respondents.

3.3.5. Participant Feedback and Suggestions for Improvement

The survey asked participants for comments and suggestions to improve the offerings they participated in, which the evaluation team then coded as mentions. Table 19 summarizes the number and types of comments and suggestions offered. Most respondents did not offer any comments or suggestions; only 25% (Packs) to 28% (Online Marketplace) did so in CY 2025, similar to CY 2024 (28% and 30%, respectively). Most comments related to Packs were suggestions for improvement in CY 2025 (55%), continuing an upward trend over the last three years (42% in CY 2024 and 36% in CY 2023). Online Marketplace comments were evenly split between positive (50%) and negative (50%), which is lower than CY 2024 (60%) but identical to CY 2023 (50%).

Table 19. CY 2024 Direct to Customer Percentage of Comments and Suggestions by Offering

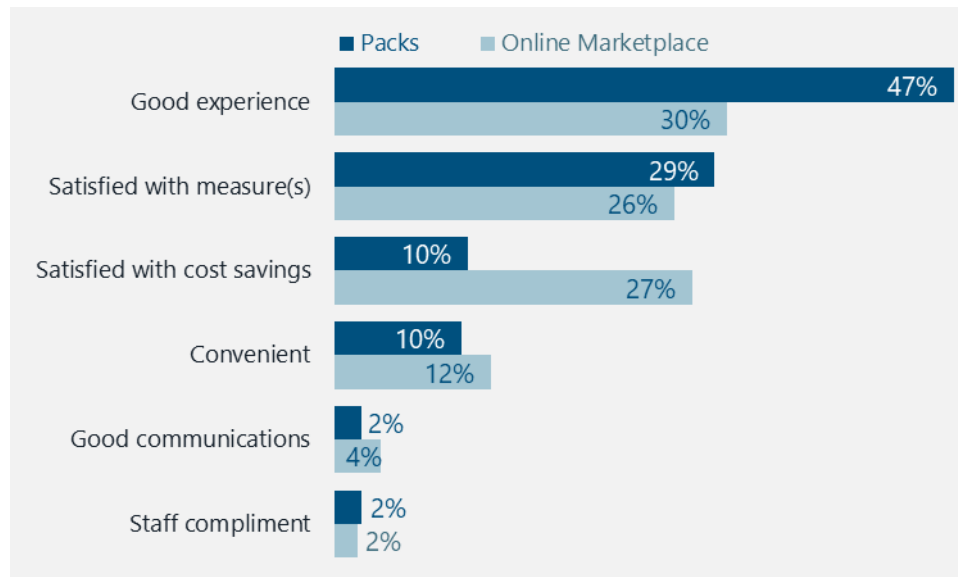
Offering	Total Completed Surveys	Gave Comments	Gave Comments (%)	Total Mentions	Positive Comments (%)	Suggestions for Improvement (%)
Packs	1,416	364	25%	441	45%	55%
Online Marketplace	1,236	346	28%	457	50%	50%

More than 80% of positive comments across both offerings reflected satisfaction with the measures received, satisfaction with cost savings (e.g., instant rebates and lower utility bills), or a generally positive experience (e.g., non-specific comments such as “it was good” and “thanks for this offering”). Online Marketplace respondents who purchased discounted measures through the program were more likely to mention satisfaction with cost savings than Packs respondents who received measures for free (27% of Online Marketplace respondents compared to 10% of Packs respondents.) Only 2% of positive comments

(for both offerings) mentioned Focus on Energy staff, who do not usually have direct contact with participants in the Direct to Customer program. These results align with survey results from past years.

Figure 13 shows the distribution of positive mentions by topic area and offering.

Figure 13. Direct to Customer—Positive Comments

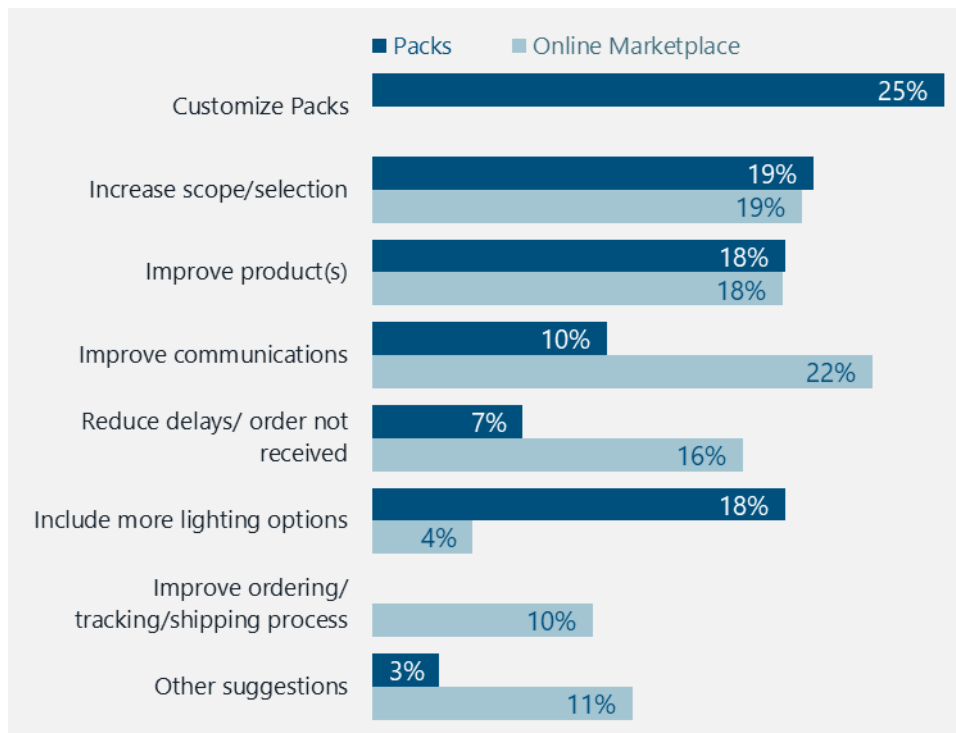


Source: Packs and Online Marketplace Participant Satisfaction Survey Question: “Please tell us more about your experience and any suggestions for improvement.” Total positive mentions: (Packs n=197; Online Marketplace n=228)

The most common suggestion from Packs respondents in CY 2025 was to allow participants to customize the items in their packs (25%), which matched the prior three years. Most of the remaining suggestions were about the Pack measures, including that product quality needs improvement (18%), that the selection of lighting needs improvement (18%), or that the scope and selection of available products should be generally increased (19%). These were also frequent suggestions in CY 2024.

The most common suggestions from Online Marketplace respondents in CY 2025 were to improve communications about the offering (22%), followed by increasing the variety of items offered (19%), improving product quality (18%), and reducing delays (16%). Suggestions about improving communications typically related to the clarity of information about items offered, requests for more information about saving energy, and more promotion for Focus on Energy offerings. Many Online Marketplace respondents’ suggestions to improve communications, specifically regarding installation instructions and compatibility issues with smart thermostats, were similar to those from previous years. Online Marketplace respondents were also more likely to say they received too many emails about the offering. Ten percent of CY 2025 suggestions from Online Marketplace respondents related to the ordering, tracking, and shipping process, similar to previous years. Figure 14 shows suggestions for improvement.

Figure 14. Direct to Customer—Suggestions for Improvement



Source: Packs and Online Marketplace Participant Satisfaction Survey Question: “Please tell us more about your experience and any suggestions for improvement.” Total suggestions for improvement: (Packs n=244, Online Marketplace n=229)

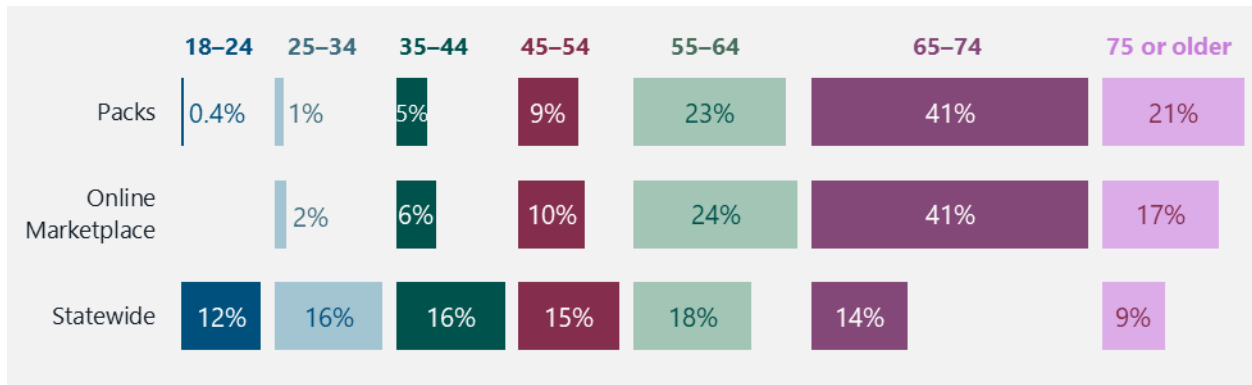
3.3.6. Demographics

The customer satisfaction survey asked respondents about their age, household income, and the number of people living in their household. Most Direct to Customer respondents were age 55 or older (85% for Packs and 82% for Online Marketplace), compared with only 41% of the statewide population.

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Figure 15 and Figure 16 summarize the respondents' ages and incomes.

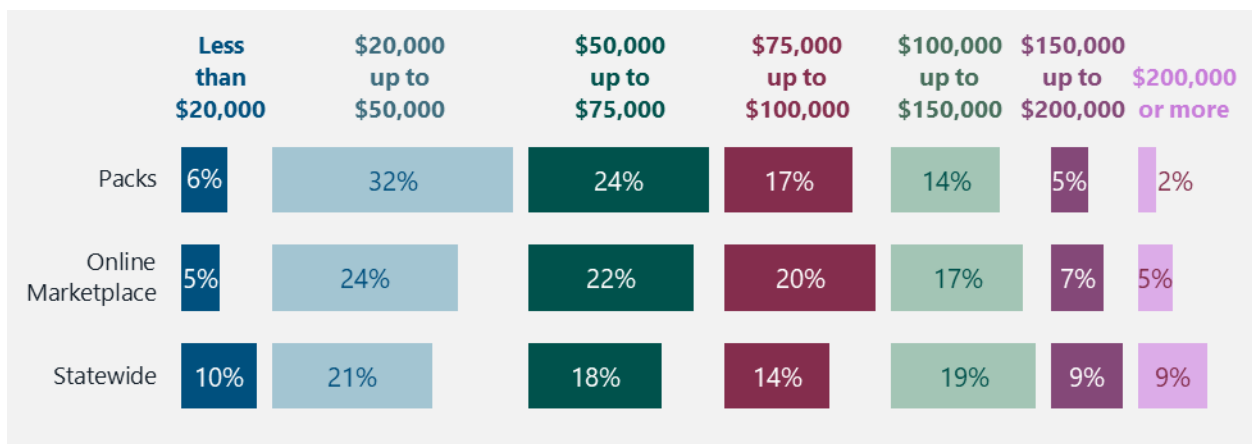
Figure 15. Direct to Customer—Participant Age



Source: Packs, Online Marketplace, Participant Satisfaction Survey Question: “Which of the following categories best represents your age?” (Packs n=1,321, Online Marketplace n=1,179). U.S. Census 2024 American Community Survey (ACS), Selected Social Characteristics in the United States.

Respondents' self-reported household income distributions were similar in CY 2025 and CY 2024, with a median income between \$50,000 and \$75,000 for respondents in both surveys. Compared to the statewide income distribution, Packs respondents were a little more likely to earn under \$50,000 (38% compared to 31% statewide, while Online Marketplace respondents were closer to the statewide distribution (29%).

Figure 16. Direct to Customer—Participant Income-Level

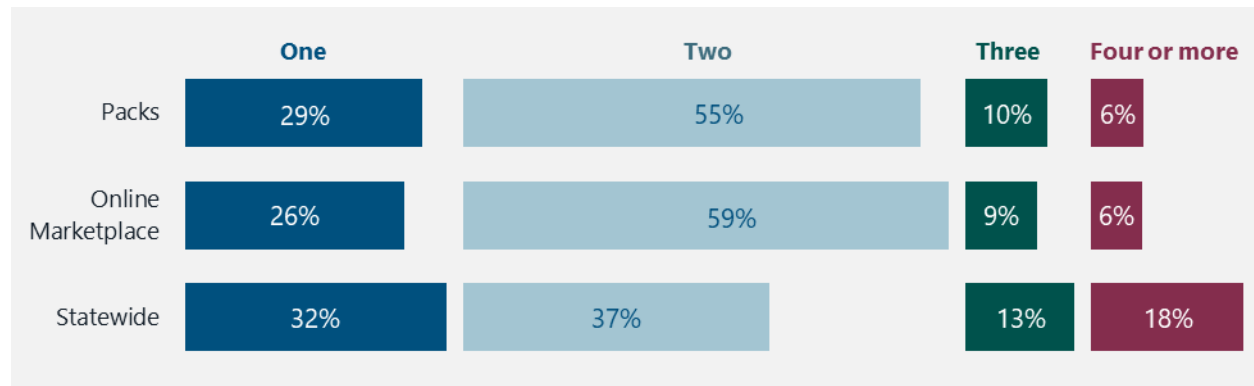


Source: Packs and Online Marketplace Participant Satisfaction Survey Question: “Which category best describes your total household income before taxes?” (Packs n=939, Online Marketplace n=870). U.S. Census 2024 ACS, Selected Social Characteristics in the United States.

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As shown in Figure 17, Direct to Customer respondents were less likely than the statewide distribution to have three or more people in their household (16% Packs, 15% Online Marketplace, 31% statewide).

Figure 17. Direct to Customer—Participant Household Size



Source: Packs and Online Marketplace Participant Satisfaction Survey Question: “Counting yourself, how many people live in your household on a full-time basis today? Please include everyone who lives in your home and exclude anyone just visiting or children who may be away at college or in the military.” (Packs n=1,310, Online Marketplace n=1,167). U.S. Census 2024 ACS, Selected Social Characteristics in the United States.

3.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a demand-side management offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III includes a description of the TRC test.

Table 21 lists the CY 2025 incentive costs for the Residential Direct to Customer Program.

Table 21. CY 2025 Residential Direct to Customer Incentive Costs

Offering	Incentive Costs
Direct Install	\$15,395
Online Marketplace	\$1,349,421
Packs	\$4,552,932
Total	\$5,917,749

The evaluation team found that the CY 2025 Residential Direct to Customer Program was cost-effective (2.30). Table 22 lists the evaluated costs and benefits.

Table 22. CY 2025 Residential Direct to Customer Costs and Benefits

Cost and Benefit Category	Total
Costs	
Administration Costs	\$310,809
Delivery Costs	\$3,418,813
Incremental Measure Costs	\$6,396,789
Total Non-Incentive Costs	\$10,126,411
Benefits	
Electricity Benefits (kWh)	\$2,795,138
Capacity Benefits (kW)	\$3,788,961
Transmission and Distribution (T&D) Benefits (kW)	\$1,086,337
Gas Benefits	\$11,139,903
Emissions Benefits	\$8,145,649
Total TRC Benefits	\$26,955,987
Net TRC Benefits	\$16,829,576
TRC Benefit/Cost Ratio	2.66

3.5. Outcomes and Recommendations

The evaluation team identified the following outcomes and recommendations to improve the Direct to Customer Program, based on the CY 2025 program evaluation activities.

Outcome 1. Income-Qualified Direct Install participants are largely satisfied with their thermostats and the Focus on Energy Website. The majority of respondents said they were satisfied with their new thermostat, the process of learning to use it, the process of ordering it, and the helpfulness of the Focus on Energy website.

Outcome 2. Income-Qualified Direct Install participants are less satisfied with their experience of finding and scheduling a contractor to install the thermostat through the incentivized installation. Additionally, the discounted installation cost was not a large motivation for participants. As learned through the comments from respondents who received the incentivized installation (detailed in the *Measure and Contractor Satisfaction* section), respondents had varying experiences with the contractor installation process. Of the four respondents who received the installation incentive, two had less-than-positive experiences with the installation. Only about 25% of participants utilized the installation incentive (Table 16), and it received the lowest motivation factor ratings. Both the price of the thermostat and the free shipping were more motivating for respondents (Figure 4).

Recommendation 2. Consider improvements to the direct installation processes and incentives.

Customers found the thermostat discounts and free shipping more motivating than the installation incentive and expressed lower satisfaction with the process of scheduling installation contractors. Improve

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the Focus on Energy website scheduling process to make it easier and more timely to schedule a contractor, thereby making the installation incentive more appealing. Consider offering increased incentives for those installing the thermostat themselves.

Outcome 3. Although realization rates are strong for the Direct to Customer program, several minor errors could be corrected to improve measure-level accuracy. These included incorrect deemed savings assignments, work paper errors, and the application of incorrect delivery channel inputs.

Recommendation 3. To improve accuracy in savings estimates and avoid discrepancies in realization rates, ensure timely alignment with the current program year's TRM. Projects that transition between calendar years should be reviewed and updated promptly to reflect the most current deemed savings values.

4. Multifamily Program

Through the Multifamily Program, Focus on Energy offers technical assistance and prescriptive and custom incentives to participants who install energy-efficient measures in multifamily buildings of four or more units.

In CY 2025, the Multifamily Program consisted of two primary offerings:

- **Multifamily.** This offering is available for existing multifamily buildings with four or more units. It consists of prescriptive rebates for installing energy-efficient equipment, including HVAC, lighting, controls, and building envelope measures. It also covers custom incentives for more complex measures, including non-solar renewable technologies. The offering also provides increased incentives for heating and cooling equipment, as well as insulation and air sealing, to units with occupant households that meet income-qualification requirements⁶ or if at least 50% of the residential units of the entire building are qualified.
- **Energy Design Assistance/Energy Design Review (EDA/EDR).** This offering is available for new construction, major renovation, and addition projects over 5,000 square feet. It provides a whole-building energy analysis of multiple design options and incentives based on the building's overall modeled energy savings. In addition to multifamily projects, this offering was available through the nonresidential Business and Industry, Schools and Government, and Large Industrial programs. In CY 2024, Focus on Energy replaced Product Equipment Performance (PEP) with the Express Energy Design Assistance (eEDA) track to streamline the process and online energy modeling.

The program administrator is APTIM. CLEAResult implements the Multifamily offering and oversees program management and delivery. With support from the administrator, the implementer's energy advisors work with trade allies to promote and deliver the Multifamily Program to customers. Willdan, the Design Assistance implementer, conducts building modeling to support the EDA/EDR offering.

Additionally, the Multifamily offering includes two secondary participation opportunities and offerings:

- **Multifamily Operations and Maintenance (January 2024 – Present).** Offers incentives for completing changes to the building automation system settings to deliver no- and low-cost energy savings for the customer. Incentives are \$150 for the first opportunity completed, plus \$100 for each additional opportunity completed, up to a total of \$750. Customers can apply online to receive faster verification of eligibility and the energy savings generated by implemented efficiency measures.

⁶ Income-qualified households are defined as those with incomes at or below 80% of Area Median Income.

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- Tribal Community Offerings (January 2022 – December 2026).** Developed to support tribal communities in overcoming barriers to completing energy-efficiency upgrades within tribal and member-owned housing. Participation opportunities include enhanced incentives for HVAC, insulation, and air sealing upgrades, as well as Building Performance Institute (BPI) training. Each tribe receives a set of diagnostic field-testing equipment to enable tribal communities to conduct home energy assessments for their residential and multifamily properties. Equipment upgrades in multifamily properties owned by the tribe or a tribal member are eligible to participate. Tribes are responsible for verifying eligibility for tribal member-owned housing. Customers must enroll by contacting the designated point of contact from each tribe.

Table 20 provides a detailed summary of the performance and savings impacts of the Multifamily Program in CY 2025.

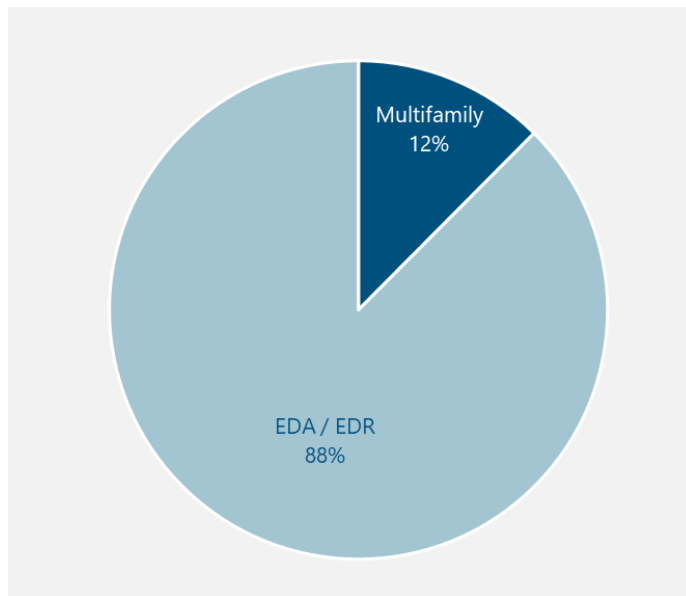
Table 20. CY 2025 Multifamily Program Summary

Item	Units	CY 2025
Incentive Spending	\$	\$2,246,507
Participation	Number of Participants	252
Verified Gross Lifecycle Savings	kWh ^a	361,699,191
	kW Summer Peak	2,715
	kW Winter Peak	1,733
	therms	13,815,320
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%
Annual NTG Ratio	% (MMBtu)	92%
Net Annual Savings	kWh	17,148,965
	kW Summer Peak	2,519
	kW Winter Peak	1,602
	therms	606,413
Net Lifecycle Savings	MMBtu ^a	2,399,968
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	1.93

^a The final reported *ex ante* Lifecycle kWh savings for the Multifamily Program contained a Spectrum error in measures attributed to MMID 10213, inflating the lifecycle kWh savings attributed to three measures. The 2025 evaluation reports reflect the corrected values for these measures and for the Program as a whole. For this reason, the Multifamily Program and Multifamily existing buildings offering Lifecycle kWh and Lifecycle MMBtu values reported here will differ between the evaluation savings values reported here and the final tracking data savings values reported.

Figure 18 shows the proportion of Multifamily Program savings by offering. In CY 2025, the Multifamily Existing Building offering contributed 13% of the verified gross lifecycle MMBtu savings, and the EDA/EDR offering contributed 87%.

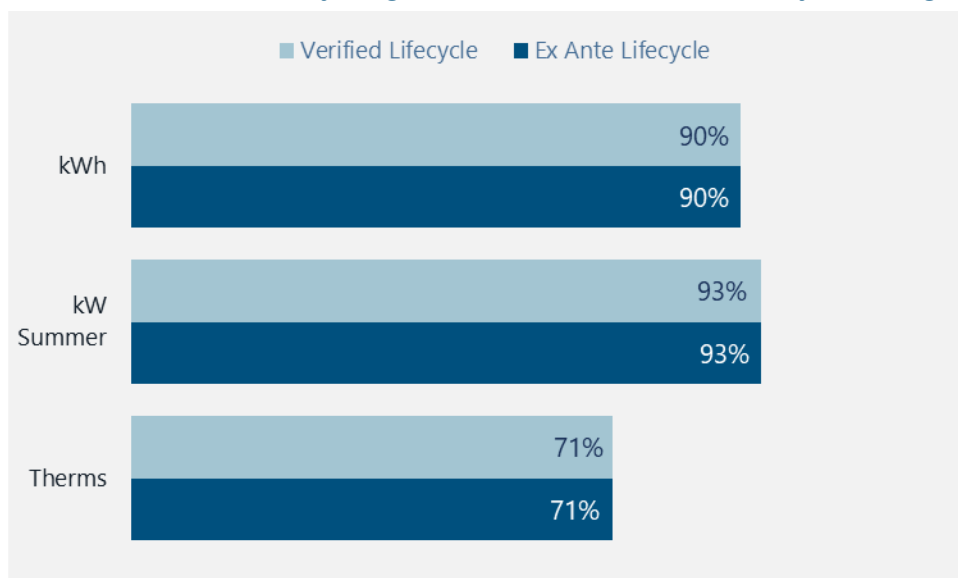
Figure 18. CY 2025 Proportion of Multifamily Program Gross Lifecycle Savings by Offering



4.1. Achievement Against Goals

As shown in Figure 19, in CY 2025, the Multifamily Program achieved 90% of its electric energy savings goal, 93% of its peak summer demand savings goal, and 71% of its therm savings goal based on verified lifecycle savings at the program level.

Figure 19. CY 2025 Multifamily Program Achievement of Gross Lifecycle Savings Goals



100% *ex ante* gross lifecycle savings reflect the implementer’s contract goals for CY 2025. Verified gross lifecycle savings contribute to the administrator’s portfolio-level goals. Winter kW goals were not established for CY 2025.

4.2. Impact Evaluation

This section presents the findings from the CY 2025 impact evaluation of the Multifamily Program.

4.2.1. Impact Evaluation Methodology

The evaluation team designed its CY 2025 impact evaluation, measurement, and verification approach to integrate multiple perspectives into its assessment of program performance. The team used the following approaches to measure the impact of the Multifamily Program:

- Tracking database review
- Engineering desk reviews
- Virtual verification site visits and interviews
- Engineering savings calculations

Table 21 lists the specific data collection activities and sample sizes used in the evaluation. Additional details about these activities and their findings can be found in the offering-specific discussions below.

Table 21. CY 2025 Multifamily Impact Evaluation Activities and Sample Sizes

Offering	Total Measures	Impact Evaluation Sample		
		Desk Reviewed Measures	Virtually Verified Measures	% Sampled (by <i>Ex Ante</i> MMBtu Savings)
Multifamily	360	34	7	41%
EDA/EDR ^a	109	16	8	38%
Total	469	50	15	39%

^aExpress EDA measures are included within the EDA/EDR offering.

Engineering Desk Reviews

The evaluation team reviewed all available project documentation in SPECTRUM for a sample of 50 measures offered through the CY 2025 Multifamily Program. This review included an assessment of the implementer’s savings calculations and methodology. The team relied on the applicable TRMs and other relevant secondary sources as needed. Secondary sources included energy codes and standards, case studies, and energy efficiency program evaluations of comparable measures (based on geography, sector, measure application, and date of issue).

For prescriptive measures, the team used the Focus on Energy 2025 TRM and associated work papers as the primary sources to determine methodology and data in nearly all cases. For hybrid and custom measures, the team reviewed the SPECTRUM savings analysis workbooks and adjusted inputs and methodologies as necessary based on engineering judgment and project documentation.

To conduct the impact analysis of the program, the evaluation team selected a representative sample of measures and then extrapolated the findings from the random sample to the larger population. In CY 2025, this process used purposive and proportional sampling by the following process:

- **Census sampling** selected the measures with the largest savings by offering (called census measures). The team used a percentage distribution analysis to determine the savings threshold,

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as it varied by offering. The census sample included most measures larger than 5% of each offering’s MMBtu lifecycle savings by sampling wave. Because these measures were sampled with certainty (100% of the eligible highest saving measures were sampled), the team did not extrapolate the results to the offering population.

- **Random sampling** randomly selected measures from the population of offering measures (called randomly sampled measures). The team stratified the population by reported savings, fuel type, and, sometimes, measure type to ensure the overall representativeness of the selected sample. The team extrapolated the cumulative realization rate of randomly sampled measures by offering to the remainder of the offering’s population.

Virtual Verification Site Visits

The evaluation team conducted 15 virtual verification site visits, including interviews with the site contact. Virtual site visits were conducted for sampled measures where the savings impact was high, the measure type was hybrid or custom, or there were outstanding questions that required clarification to complete the evaluation of the measure. Evaluation staff verified the type and quantity of equipment installed, determined how the installed equipment is controlled, and documented operating hours. The team then verified the savings calculation input parameters based on operational and occupancy schedules, reported and observed setpoints, trend data, utility data, and any other relevant details identified prior to contact with the site.

4.2.2. Verified Gross Savings Results for the Multifamily Program

Table 22 lists the first-year and lifecycle realization rates for the CY 2025 Multifamily Program by offering. Table 23 lists verified first-year and lifecycle savings by offering and the program overall. The sampled projects represent 39% of the Multifamily Program lifecycle MMBtu savings. Overall, the program achieved a first-year evaluated realization rate of 100%, weighted by total energy savings (MMBtu). Note that at the measure level, there was variability between fuel types in terms of the realization rates. The team determined realization rates by strata, such as census and sample strata, and summed reported and verified savings at the offering level to arrive at savings and realization rates. Detailed findings for each offering, including factors affecting the realization rates, are discussed in the next section of this chapter.

Table 22. CY 2025 Multifamily Program First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Multifamily	100%	100%	100%	100%	100%	100%	100%	100%
EDA/EDR	100%	100%	100%	100%	100%	100%	100%	100%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Table 23. CY 2025 Multifamily Program First-Year and Lifecycle Verified Energy Savings Summary

Offering	Verified First-Year Savings					Verified Lifecycle Savings		
	kWh	kW Summer	kW Winter	therms	MMBtu ^a	kWh	therms	MMBtu ^a
Multifamily	1,249,093	60	100	114,458	15,708	15,199,871	2,739,960	325,858
EDA/EDR	17,324,966	2,655	1,634	549,907	114,103	346,499,320	11,075,360	2,289,792
Total	18,574,059	2,715	1,733	664,365	129,811	361,699,191	13,815,320	2,615,650

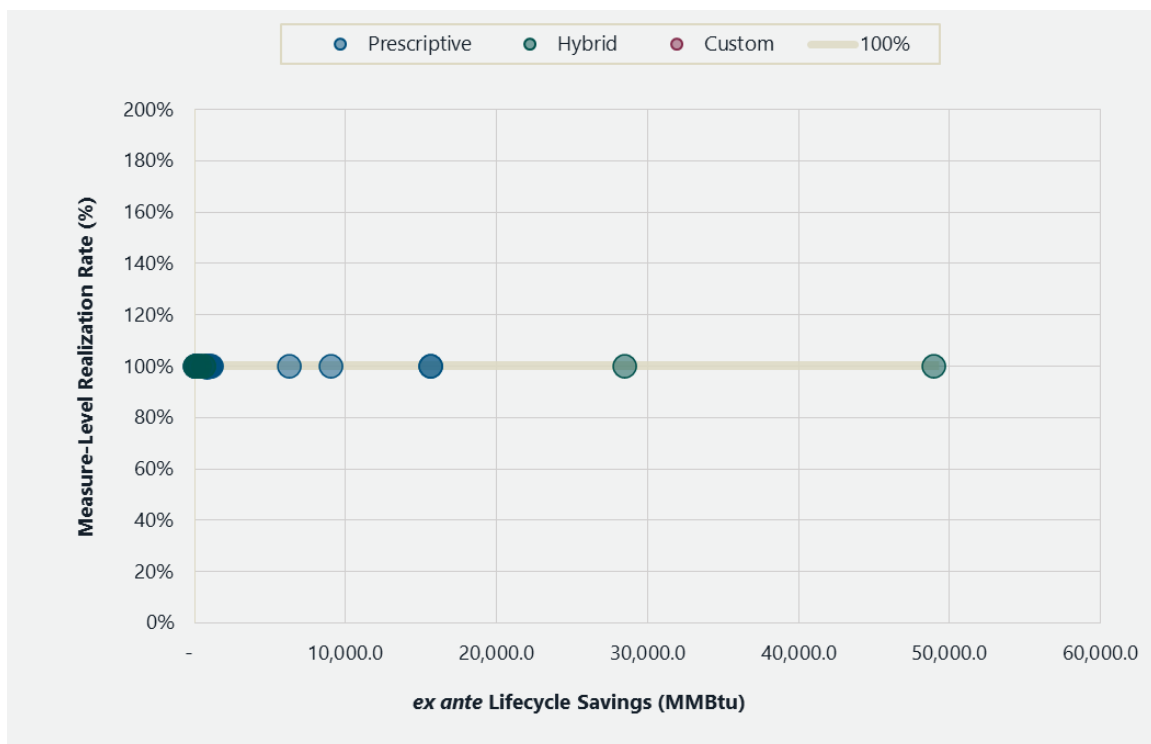
^a Verified kWh and therm savings may not sum to verified MMBtu values due to conversion/rounding associated with measure-level application of realization rates.

Multifamily Offering: Verified Gross Savings Results

For the Multifamily existing building offering, which includes all measures except for EDA/EDR and Express EDA, the evaluation team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The sampled projects represent 41% of the offering’s lifecycle MMBtu savings. The offering had a gross lifecycle realization rate of 100%.

Figure 20 illustrates the magnitude and associated realization rates for *ex ante* lifecycle MMBtu savings of the sampled projects. None of the *verified* savings calculations deviated from *ex ante* savings in the Multifamily offering sample. The evaluation team found no discrepancies affecting the realization rates for any of the sampled projects. Although there were very slight rounding errors in *ex ante* calculations, all cases resulted in 100% realization rates for first-year and lifecycle energy savings.

Figure 20. CY 2025 Multifamily Offering Sampling Results



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Table 73 lists the CY 2025 *ex ante* and verified gross savings by first-year and lifecycle gross savings for the Multifamily offering. One Department of Administration Solar/Heat Pump Pilot project and one Tribal Community offering project were reported under the Multifamily offering in CY 2025. Savings for heat pumps installed through those projects are rolled into the Multifamily offering savings.

Table 24. CY 2025 Multifamily Offering *Ex Ante* and Verified Gross Savings

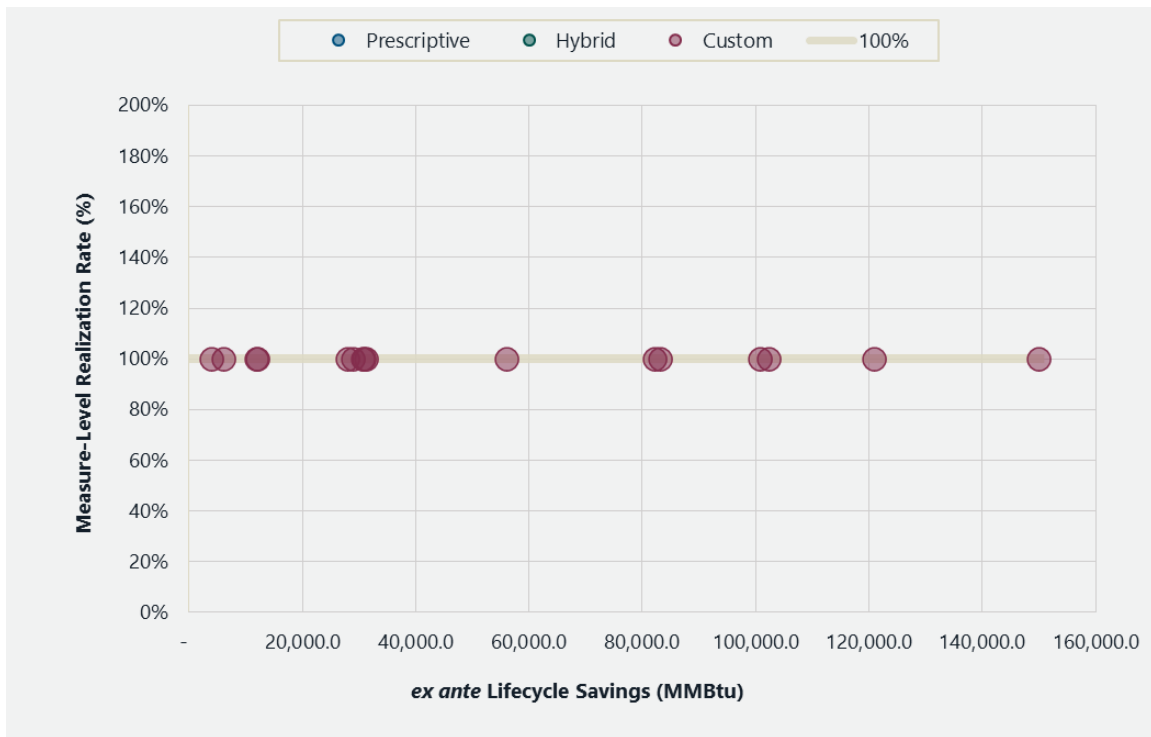
	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	1,249,093	60	100	114,458	1,249,093	60	100	114,458
Lifecycle Gross Savings	15,199,871	60	100	2,739,960	15,199,871	60	100	2,739,960

EDA/EDR Offering: Verified Gross Savings Results

For the EDA/EDR offering, which also included Express EDA measures, the evaluation team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The EDA/EDR evaluation procedure involves reviewing the SIM files, the net energy optimizer (NEO) modeling results, the written report, the project specifications, and the data entered into the project tracking system, and looking for consistency across all documents. The evaluation team conducted interviews for a portion of the sampled EDA/EDR measures. Any additional documentation collected from customers during interviews was compared with the rest of the submitted documentation to ensure alignment of reported values. Where there were discrepancies or a lack of additional information, the evaluation team considered the ModelSim reports to be the final as-built and based its evaluation on that output. The sampled projects represent 38% of EDA/EDR lifecycle MMBtu savings. The offering achieved a gross lifecycle MMBtu realization rate of 100%.

Figure 21 illustrates the magnitude and associated realization rates for reported MMBtu savings of the sampled projects.

Figure 21. CY 2025 EDA/EDR Offering Sample Results



Two sampled measures deviated very slightly in first-year realization but rounded to 100% lifecycle MMBtu realization. The following describes the main factors affecting the deviations:

- The team made adjustments to one randomly selected Express EDA measure to correct hard-coded calculations to live numeric calculations, which resulted in a slight increase in kW demand savings, with a kW realization rate of 105%.
- The team made adjustments to one randomly selected EDA measure to align the first-year therm savings value between the NEO model's reported results and the SIM files. The modification resulted in an insignificant reduction in first-year and lifecycle therm savings, with a realization rate to 99.9% for both.

Table 25 lists the CY 2025 *ex ante* and verified gross savings by first-year and lifecycle gross savings for the EDA/EDR offering.

Table 25. CY 2025 EDA/EDR Offering *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	17,324,966	2,655	1,634	549,907	17,324,966	2,655	1,634	549,907
Lifecycle Gross Savings	346,499,320	2,655	1,634	11,075,360	346,499,320	2,655	1,634	11,075,360

4.2.3. Verified Net Savings Results for the Multifamily Program

The evaluation team used CY 2023 participant survey results to assess net savings for the CY 2025 Multifamily Program. To calculate the NTG for each offering in CY 2025, the team combined the self-reported freeridership and participant spillover results using the following equation.

$$NTG = 1 - \text{Freeridership Ratio} + \text{Participant Spillover Ratio}$$

Table 26 shows the NTG ratios applied to the CY 2025 Multifamily Program.

Table 26. CY 2025 Multifamily Program NTG Ratios by Offering

Offering	Freeridership	Spillover	NTG Ratio
Multifamily	20%	3%	83%
EDA/EDR	7%	0%	93%

Table 27 shows the total lifecycle gross verified savings, lifecycle net savings, and final NTG ratios for the Multifamily Program in CY 2025.

Table 27. CY 2025 Multifamily Program Total Lifecycle Net Savings and NTG

Offering	Total Lifecycle Gross Verified Savings (MMBtu)	Total Lifecycle Net Savings (MMBtu)	NTG Ratio
Multifamily	325,858	270,462	83%
EDA/EDR	2,289,792	2,129,506	93%
Total	2,615,650	2,399,968	92%

4.3. Process Evaluation

The CY 2025 process evaluation of the Multifamily Program focused on exploring participant interactions and satisfaction with the eEDA track, and on learning from affordable housing building owners and managers about how a potential program could support their participation.

4.3.1. Process Evaluation Methodology

In CY 2025, the evaluation team conducted a process evaluation of the Multifamily Program, designing the evaluation approach to assess key research topics and understand changes from CY 2024. Table 28 lists specific data collection activities and completed surveys and interviews used in the evaluation.

Table 28. CY 2025 Multifamily Program Process Evaluation Activities and Sample Sizes

Activity	CY 2025 Completes (n)
Program Documentation Review	✓
Program Staff Interview	1
Express EDA Participant Interviews	6
Multifamily Affordable Housing Building Owner and Manager Interviews	9
Ongoing Participant Satisfaction Surveys	8

Program Documentation Review

The evaluation team reviewed the Multifamily Program implementation and marketing plans to understand the program structure and its implementation in CY 2025.

Program Staff Interview

The team conducted one combined interview with program administration and implementation staff in July 2025. The interview focused on relevant program changes, research objectives, and program data to better inform the scope of interviews with affordable housing building owners and managers and eEDA interviews.

Express EDA Participant Interviews

Since Focus on Energy launched the eEDA track in March 2024, 17 different owners/managers have completed 22 eEDA projects⁷. In 2025 alone, eight owners/managers completed 10 projects. In October through December 2025, the evaluation team contacted the full population of 17 program participants from CY 2024 and CY 2025 to maximize the response rate. The team conducted six interviews with participants in the Multifamily eEDA track, representing a 35% response rate.

The research objectives of the interviews included assessing participants' awareness, motivations for participation, and experiences with various aspects of the program, as well as collecting participants' feedback and suggestions for improving the offering. The evaluation team also hoped to compare

⁷ In 2024, nine different owners/managers completed 12 eEDA projects. In 2025, by eight owners/managers completed 10 projects.

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participants' experiences between eEDA and the former PEP offering; however, none of the interviewed participants reported participating in the PEP offering, so the team could not conduct a comparative analysis.

Multifamily Affordable Housing Building Owner and Manager Interviews

The purpose of this research was to collect insights from affordable housing building owners and managers to inform Focus on Energy's design of future programs to better meet the needs of affordable housing providers and tenants. The evaluation team obtained a list of 47 affordable housing building owners and managers from the program administrator. Of that population, 21 owners and managers included contact information; these constituted the sample frame for the interview. From that sample frame of 21 building owners and managers, the team conducted nine interviews.

The interviews aimed to understand affordable housing building and ownership characteristics, assess what types of HVAC and water heating equipment are installed in affordable housing properties, identify how affordability constraints influence energy efficiency projects, assess participants' historical experiences with Focus on Energy, explore heat pump opportunities and barriers, and collect input on potential future program design.

Ongoing Participant Satisfaction Surveys

Using contact information stored in SPECTRUM, the program administrator oversaw web-based satisfaction surveys throughout the year to CY 2025 participants. There were two objectives for these satisfaction surveys:

- Understand customer satisfaction on an ongoing basis and respond to any changes in satisfaction before the end of the annual reporting schedule
- Help to facilitate timely follow-up with customers to clarify and address service concerns

A total of eight Multifamily Program participants responded to the CY 2025 survey. The survey covered several topics, including overall satisfaction, satisfaction with offering staff and trade allies, the likelihood of recommending Focus on Energy, and other feedback.

4.3.2. Program Design and Delivery

Participation in the Multifamily Program primarily occurs through the Multifamily offering. The Multifamily offering provides incentives for a broad range of energy-efficient prescriptive measures and custom projects in existing buildings. The EDA/EDR offering provides design assistance or review, in addition to incentives for new construction, major remodeling, or additions. Customers can apply for incentives directly through Focus on Energy or via their trade ally. They receive support from the implementer's energy advisors and, occasionally, from their utility account representatives.

The Multifamily Program has two dedicated energy advisors. Each energy advisor covers a geographic region of the state. The energy advisors manage relationships with multifamily building owners, managers, associations, and trade allies. They provide several services, helping building owners and managers identify opportunities to improve energy efficiency, understand available incentives, conduct engineering calculations for custom projects, and complete application materials.

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In CY 2025, the program design remained consistent with CY 2024, except for HVAC and lighting incentives, which were adjusted to align with business program rates.

Department of Administration Solar/Heat Pump Pilot

Focus on Energy launched this pilot in Q1 2023 with the goal of supporting weatherization agencies' improvements to multifamily buildings. The pilot covers half of the costs of solar photovoltaic (PV) and heat pumps in small multifamily buildings with existing electric resistance heating. To qualify, a building must have between four and 12 units and incorporate both solar PV and heat pump space heating. Buildings must also meet income-qualification requirements and must have been previously weatherized or include weatherization in the project scope.

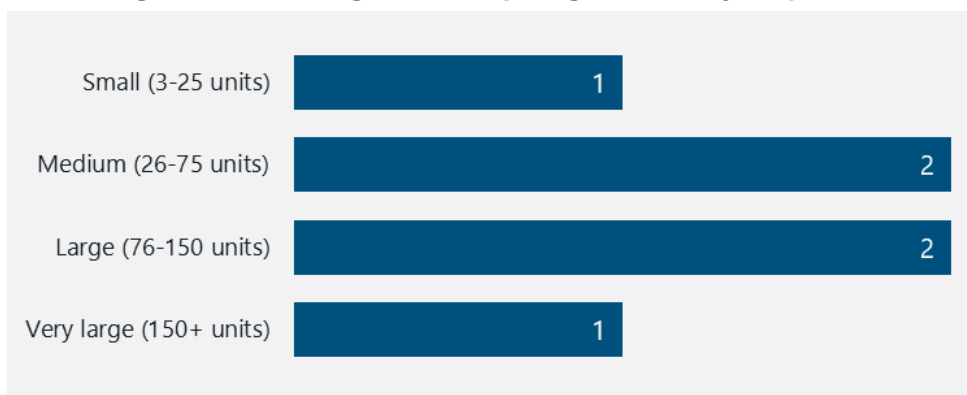
The pilot offers incentives of \$1,500/kW (direct current) for up to 7 kW per solar PV unit and 50% of the cost of heat pump units (up to \$3,000 for air source heat pumps and up to \$800 for heat pump water heaters). The maximum total incentives are \$75,000 per building and \$225,000 per property.

4.3.3. Express EDA Participant Interview Findings

Express EDA Participant Profiles

Cadmus interviewed six eEDA participants, all of whom own or manage multifamily projects. Of the six participants interviewed, four described their properties as apartments and two as townhomes. As shown in Figure 22, respondents reported a range of sizes for their multifamily properties, including one small-sized apartment complex with 16 units, two medium-sized apartment complexes ranging from 26 to 75 units, two large apartment complexes ranging from 76 to 150 units, and one very large apartment complex with 330 units.

Figure 22. Size Range of Participating Multifamily Properties



Source: Express EDA Interviews. "What is the size range of the multifamily property that participated in the Express EDA track?" (n=6)

Respondents reported implementing a range of measures through their involvement in eEDA. Three (n=6) said they implemented lighting at their properties, while two reported implementing lighting in combination with HVAC or water-heating systems. Three respondents said their projects were too far along in the construction process to implement Focus on Energy recommendations. However, two of these respondents said participation was still valuable for verifying and validating their existing designs.

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One respondent said that although they finalized the design before receiving input, the program still provided value by confirming their design decisions and informing future projects, encouraging them to consider more efficient options moving forward.

Participant Awareness and Motivation

Respondents learned about eEDA through a variety of channels. Half of the respondents (n=6) reported learning about the program from trade allies, such as contractors and electricians. One respondent received an email from Focus on Energy and subsequently sought additional information about the offering, while another discovered eEDA through an online search. One respondent said they contacted Focus on Energy and learned about the program.

When asked about their motivations for participating in the eEDA track for multifamily buildings, all respondents (n=6) noted financial incentives as a primary motivator.

Four respondents also cited energy efficiency benefits as a motivation for participation. One respondent explained that program participation supported long-term property maintenance by incorporating energy-efficient measures as a selling point, helping maintain high-quality buildings, attract more tenants, and increase rental revenue.

"A big project gets too time-consuming and cost prohibitive, and so this program would offer a good balance of support, receiving rebates, and not being overly burdensome."

-Express EDA Participant

Participant Experience and Satisfaction

Participants were asked about their expectations before using eEDA, their experience with Focus on Energy, and their level of satisfaction with various aspects of the offering.

Expected and Experienced Benefits

When asked what benefits they expected to receive upon first enrolling in eEDA, five of the six respondents cited financial incentives. They said they were generally looking forward to receiving the rebates to make their investments cost-effective. Three respondents also mentioned they expected to receive some form of consulting or additional support from Focus on Energy throughout the program to aid in their design and construction of projects.

Participants were then asked about what benefits they experienced by participating in the program. Four respondents (n=6) reported that the primary benefit was the incentive. Other benefits included validating design requirements and ensuring that their design was accurate and appropriate. Two explained that by participating in the program, their designs were confirmed through evaluation from Focus on Energy staff.

Use and Value of Program Tools and Reports

Five of the six respondents reported they did not use the New Construction Online Tool, which guides customers to available and applicable incentives, estimates energy savings for projects, and provides key resources during their experience in eEDA. One respondent reported using the New Construction Online Tool and said it was relatively easy to use and suggested adding drop-down menus to make the tool "more user-friendly."

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Participants were also asked about the usefulness of the final report and whether it added value to their projects. Four of the six respondents indicated that the final report added some value. These respondents generally noted that the report helped confirm design decisions and encouraged consideration of additional energy-efficient measures or Focus on Energy offerings for future projects, even if those measures were not incorporated into the current project. One respondent said they present a final report to property owners to help them better understand their home's energy use and validate the efficiency of the completed project.

Two of the six respondents reported specific examples of how the eEDA track has added value to their project. One said the upgraded lighting helped to save money and reduce energy usage. Another explained that their benefit was Focus on Energy verifying the design choices for fan coil units, which confirmed the design was efficient.

Enrollment Experience

Most participants described the enrollment process as relatively easy. Five participants (n=6) said the process was straightforward and that communication with Focus on Energy staff was generally responsive and helpful. However, two reported some difficulty due to long response times from Focus on Energy staff via email.

All six participants indicated they enrolled in eEDA either late in the design phase or during the construction. As a result, experiences varied. Two participants reported uncertainty about whether they had enrolled at the most advantageous stage of their project. Both noted they were unclear about when (at which stage) to initiate participation or enrollment to maximize the program's full benefits.

Implementation Review Process and Inspections

When asked to rate their experience with the implementation review process for the eEDA track, all six participants indicated some level of ease: three reported it was *very easy*, and three reported *it was somewhat easy*. One participant explained that it took some extra effort to gather the information and documentation, but that the Focus on Energy consultant provided great support. Another participant said that when they had questions, they received responses from program staff within 24 hours and said that if they could "rate the program a 10," they would. Overall, all the participants found the implementation review process easy.

Four of the six respondents reported that their project did not require an on-site inspection, while two said it did. Both respondents who indicated their projects underwent an inspection reported satisfaction with the process.

Focus on Energy Support and Communication

Five of the six respondents reported seeking Focus on Energy support at some point during their participation in eEDA. Of these five respondents, four were satisfied with the assistance they received from Focus on Energy, and one described the support as "helpful and responsive." The fifth described some initial frustration related to delayed communication, noting that it took one year for someone to follow up on their initial request to join the eEDA track. By the time the follow-up occurred, they were already in the construction phase of their project. This participant explained that this issue most likely occurred because

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the eEDA offering was newly launched and noted that communication and support improved substantially, with few issues encountered moving forward.

Two respondents (n=6) provided insight into how Focus on Energy could improve its support for customers, both noting the need for clearer, more streamlined communication. One said they would have benefited from an initial phone call that explained the program, including available support, customer responsibilities, and key process steps. Another described email communication as occasionally disjointed and slow, noting uncertainty about the roles of multiple Focus on Energy staff included on email threads. This respondent also expressed a preference for being consulted before additional parties, such as subcontractors, were included in communications.

Overall Satisfaction

Overall satisfaction with eEDA was high. All six respondents reported satisfaction with their final incentive payment, and all but one indicated some level of satisfaction with their overall experience participating in the eEDA track (Figure 23). The one neutral rating was from the aforementioned respondent, who enrolled in the track in its early stages.

Figure 23. Satisfaction with Express EDA



Source: Express EDA Interviews. "On a scale of 1 to 5, how would you rate your overall experience with Express EDA?" (n=6)

Multifamily Feedback and Suggestions for Improvement

Participants were asked to reflect on how well the eEDA track specifically addresses the needs of multifamily properties. Several respondents identified technical support aspects of the multifamily building design and operations that the program addressed effectively.

Two (n=6) noted that Focus on Energy provided helpful technical support with power usage calculations and design criteria. These respondents reported that program staff guided them through the calculation process and design requirements, which helped ensure accuracy and supported the selection of energy-efficient options. A third respondent expressed satisfaction with Focus on Energy's recommendations for specific air sealing measures, water heating systems, and HVAC equipment.

Two respondents (n=6) suggested improving eEDA by providing a centralized, comprehensive database or a list of eligible equipment offerings and performance standards. Both said that having a clear and easily accessible reference would support decision-making during the design phase and reduce uncertainty when selecting equipment.

"If they gave current equipment offerings... packaged together with the incentive, then it would be easy to hand those packages to the designer."
-Express EDA Participant

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Another respondent said that more thorough equipment suggestions, including custom offerings specific to each building, would help improve participation in the program.

The three remaining respondents reported that eEDA adequately addressed the relevant aspects of their multifamily building design and operations and did not identify any areas for improvement.

Future Outlook and Suggestions for Improvements

Participants then responded to questions about their outlook for the future and suggestions for improvements to the offering. All six indicated they would be *very likely* to continue using eEDA for future new construction or major renovation projects.

Similarly, all six participants said they are *very likely* to recommend eEDA to others in the multifamily sector. One participant said they had already recommended eEDA to friends who are affordable housing developers.

When asked what improvements or additional features would make eEDA more valuable or easier to use, three participants (n=6) said nothing that would improve this program, as none of them had any issues with the program. The three other participants reported various suggestions for improvement, including:

- Build out the Focus on Energy website to make eEDA more visible and details easier to find
- Increase marketing to raise potential participants' awareness and understanding of what the offering entails, particularly for developers
- Add a real-time savings calculator so customers can compare equipment package options
- Improve communication between participants and Focus on Energy staff (such as via email) to ensure timely responses, avoid project delays, and promote customer clarity

"If there was a real-time calculator to show you the savings as you are going through it. Entering how many lightbulbs (for example) and can use that tool to compare and contrast equipment - then seeing the savings depending on which equipment you select."

-Express EDA Participant

4.3.4. Affordable Housing Building Owner and Manager Interview Findings

Affordable Housing Participant Profile

The evaluation team interviewed nine affordable housing building owners and managers to gather insight into their properties and experiences with program-supported projects. All respondents reported owning and managing multiple properties, including senior care housing and income-qualified residences. Each interview focused on the specific property that received a Focus on Energy incentive.

Interviews revealed variation in ownership models and building portfolios among affordable housing providers. Of the nine organizations interviewed, five operate exclusively in the affordable housing sector, while four also manage senior housing or market-rate units, or maintain separate lending divisions that support low-income developments. The scale of ownership ranges widely: some providers oversee

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small-scale properties, such as tiny homes, duplexes, and sixplexes, while others manage thousands of units across 12 to 30 properties.

Affordability structures are primarily driven by Section 42 Low-Income Housing Tax Credit requirements, with most providers serving households earning between 30% to 50% of the area median income. Some properties also serve public housing or Section 8 tenants, depending on financing structures and regulatory requirements.

Building size and configuration also vary considerably among the seven interview respondents who reported typical property size. Of those seven, five reported that their properties, on average, have fewer than 60 units. One respondent reported having a larger development with up to 1,000 units. Respondents emphasized that unit counts are often dictated by available capital and funding allocations rather than a standardized development model.

HVAC and Water Heating Systems in Affordable Housing

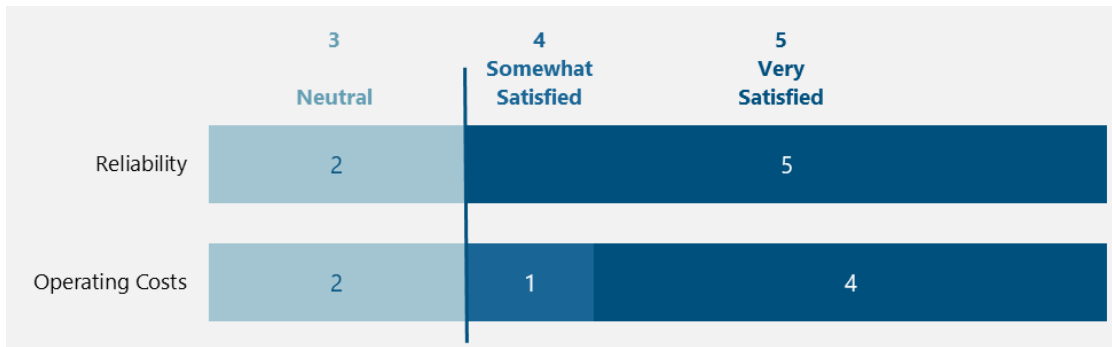
Interviews included questions to assess the heating, cooling, and water heating systems currently installed in affordable housing properties.

Heating System Performance and Satisfaction

Seven interview participants provided information about the heating systems in their affordable housing buildings. The reported heating systems varied widely across respondents, reflecting differences in building age, funding structures, and historical construction practices. Respondents reported using MagicPak systems, gas furnaces, and baseboard heaters, with older buildings more likely to rely on baseboard heat. Despite these differences, all nine respondents rated their heating system reliability at 3 or higher on a 5-point scale, as shown in Figure 24. Several respondents noted that older buildings require more frequent repairs, while others observed improved reliability after switching to electric systems. Respondents using natural gas systems generally described them as highly dependable. Some were less familiar with system maintenance needs because they are not directly responsible for equipment upkeep; however, those with direct involvement described routine filter changes, occasional system resets, and periodic part replacements as typical maintenance tasks. The two respondents who reported a neutral rating of 3 noted that, since their heating systems were recently installed, they were unable to provide insight into their reliability.

All seven respondents rated their satisfaction with heating system operating costs as generally moderate to high, rating their costs at 3 or above (Figure 24). Some respondents raised concerns about rising heating costs and said they were exploring alternative systems, while others emphasized that operating costs depend heavily on the utility provider. The two who reported a neutral rating had recently installed systems and noted they could not assess operating costs just yet. Three respondents reported that operating costs were generally either absorbed by the project or paid by the building owner, since tenants typically do not cover them.

Figure 24. Satisfaction with Heating System



Source: Affordable Housing Interviews. “On a scale of 1 to 5, where 1 is *very dissatisfied* and 5 is *very satisfied*, how satisfied are you with your main current heating system in terms of: 1. Reliability and maintenance needs/repairs, 2. Operating cost (energy bills paid by you or tenants)?” (n=7)

Respondents reported that tenant feedback regarding heating was limited. Seven respondents (n=9) reported no complaints, though one noted that tenants prefer indoor temperatures around 75° Fahrenheit. Another observed that heat pumps can struggle during Wisconsin winters, though this had not resulted in tenant dissatisfaction.

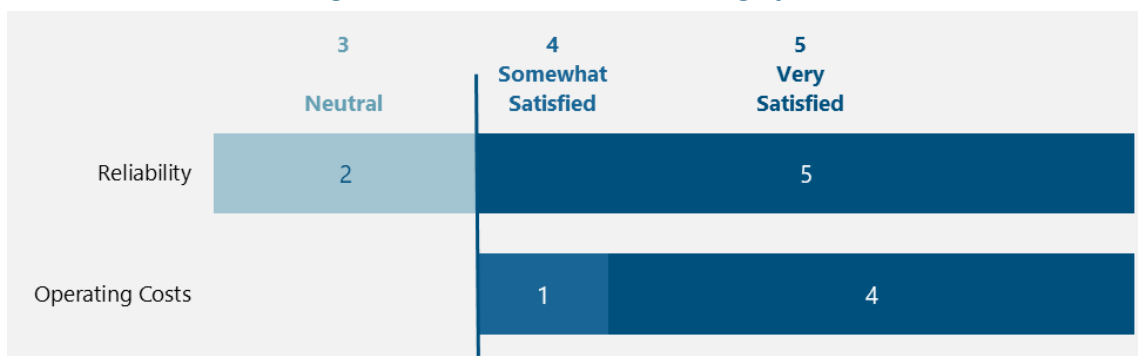
Cooling System Performance and Satisfaction

Cooling systems also varied significantly across respondents’ affordable housing properties. Respondents described using MagicPak systems, wall-mounted air conditioners, central air conditioners, and tenant-installed window units. Wall-mounted air conditioners are more common in older buildings where air conditioning was not originally included. These differences reflect both the age of the buildings and the historical perception of air conditioning as a luxury rather than a standard feature.

Seven respondents provided feedback on the reliability of their cooling systems. Five of these seven rated reliability a 3 or higher, as shown in Figure 25. Several noted that system performance depends heavily on the age of the building and equipment. Two participants explained that because their systems were recently installed and had not yet experienced a full warm season, they rated reliability a 3 due to limited exposure to extreme heat. Overall, respondents reported cooling systems functioned well, with periodic maintenance required but no major concerns.

Five participants provided numerical ratings of their satisfaction with the operating costs of their current cooling systems. All respondents rated their satisfaction a 3 or higher (Figure 25). One explained that tenants typically pay cooling costs directly, noting that affordable housing providers receive limited feedback unless issues arise.

Figure 25. Satisfaction with Cooling System



Source: Affordable Housing Interviews. “On a scale of 1 to 5, where 1 is *very dissatisfied*, and 5 is *very satisfied*, how satisfied are you with your main current cooling system in terms of: 1. Reliability and maintenance needs/repairs, (n=7); 2. Operating cost (energy bills paid by you or tenants)?” (n=5)

As with heating systems, respondents reported that tenant complaints about their current cooling systems were rare: six respondents reported no complaints, and one described receiving positive feedback on split systems that provide consistent temperature control across rooms.

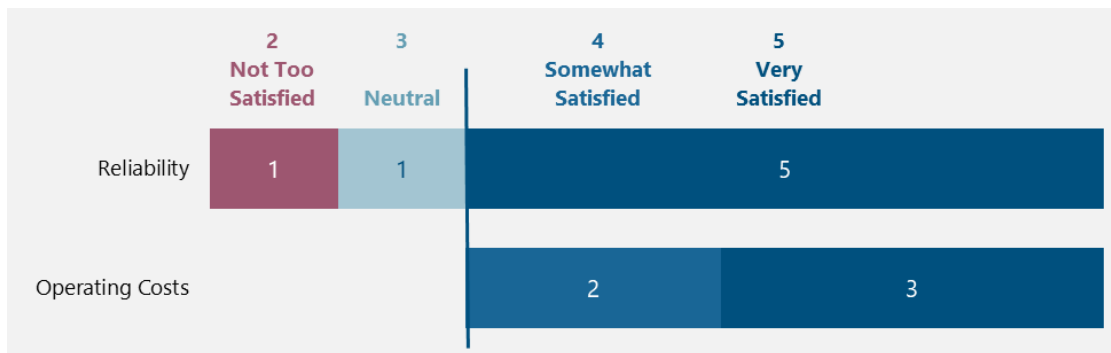
Water Heating System Performance and Satisfaction

Respondents provided information about the current water heating systems installed in their affordable housing properties. Water heating systems varied across respondents and properties. Three respondents reported using natural gas water heaters or boilers in their properties; however, one of these noted that their company is moving towards all-electric water heaters for future projects. Three other respondents reported having both electric and gas water heaters throughout their properties, noting that water heating costs are usually absorbed by the project or building owner; tenants do not pay directly for hot water.

Seven respondents rated their satisfaction with their water heating systems’ reliability using a scale of 1 to 5, where 5 is *very satisfied* (Figure 26). Five participants reported high satisfaction with their current water heating system regarding reliability and maintenance needs. One explained that they “don’t have any issues.” Two others reported lower satisfaction with the reliability and maintenance needs of their water heating systems. One who rated their satisfaction a 2 explained that they have been experiencing issues with their water heating system, and it needs to be replaced. Additionally, they explained that the replacement will be expensive, further contributing to their low rating.

Five respondents rated their satisfaction with the operating costs of their water heating system. All five respondents again reported high levels of satisfaction, also shown in Figure 26. One explained that gas in Wisconsin is cheaper than electric options, contributing to satisfaction with their current gas water heaters. Two others provided similar insight, noting that the amount of hot water used by tenants cannot be controlled. While they can install energy-efficient equipment, they explained that variability in tenant usage leads to fluctuating operating costs, which are typically covered by the building owner.

Figure 26. Satisfaction with Water Heating System



Source: Affordable Housing Interviews. “On a scale of 1 to 5, where 1 is very dissatisfied, and 5 is very satisfied, how satisfied are you with your main current water heating system in terms of: 1. Reliability and maintenance needs/repairs (n=7), 2. Operating cost (energy bills paid by you or tenants)?” (n=5)

When asked about tenant complaints related to their water heating systems, seven of the nine respondents reported none. The other two respondents identified recurring issues. One explained that gas boilers located in garages can cause noticeable delays in hot water reaching individual units. Another reported that local water conditions in the city of Madison contribute to corrosion in showers and faucets, requiring replacement every two years.

Efficiency Upgrade Processes and Barriers

Survey respondents were asked about their efficiency upgrade processes and obstacles to making those improvements.

Heating, Cooling, and Water Heating Investment Decisions

Eight of the nine respondents said that investment decisions related to heating, cooling, and water heating systems are collaborative, with no single person solely responsible. Respondents reported that decision-making typically incorporates input from the design or development teams, architects, engineers, and senior management. One explained a different dynamic where investment decisions are made solely by the developer.

Interviews also revealed that investment decisions are strongly influenced by project budgets, timelines, and funding requirements. Respondents consistently emphasized that the main motivator for making upgrades is the budget. Ensuring the project stays on budget influences all equipment investment decisions. One affordable housing participant explained that they always know the budget and funding requirements at the start of the project to ensure the project stays on budget and in accordance with any funding stipulations.

“Usually, HVAC and plumbing represent large line items in [the] project budget. [They are] more important to [the] grand scheme of things than other components.”

-Affordable Housing Participant

Several constraints affecting affordable housing development stem from regulatory and funding requirements that influence decisions about building upgrades and equipment investments. Eight of the nine interview participants reported that such requirements play a role in shaping their projects. Four

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participants specifically noted that the Wisconsin Housing and Economic Development Authority (WHEDA) imposes defined energy-efficiency standards that must be met to qualify for funding. As a primary financing source for many affordable housing providers, WHEDA requires compliance with certain systems, performance criteria, and construction standards as a condition of receiving support. One participant emphasized that WHEDA effectively establishes the baseline for project design, noting that developments must achieve a strong WHEDA score to secure tax credit awards.

Efficiency Upgrade Process

Participants were then asked whether they typically perform insulation and air sealing upgrades on their properties. Four respondents reported they have conducted or will conduct insulation and air sealing assessments. One explained they usually test new projects, and another explained they always score Wisconsin GreenBuild homes as part of the WHEDA. Two respondents said they do not conduct these tests unless required by their funding source. They noted that while some funding sources include energy efficiency measures in their projects, they do not commonly implement these upgrades outside of the funding requirements.

Four of the nine respondents reported installing HVAC and/or water heating equipment in the last few years. One noted that they have installed approximately 100 HVAC/water heating units in their Wisconsin properties.

One affordable housing provider described the process for replacing or upgrading HVAC and water heating equipment. The respondent said their company budgets for replacements on an ongoing basis and begins evaluating the buildings at year 13 to identify replacement needs.

The interview then asked whether any of the installed equipment in the affordable housing properties was energy efficient. Of the seven participants who responded to this question, all indicated some level of energy efficiency in their chosen equipment. One reiterated that equipment is energy efficient because it meets funding requirements, and another stated that their equipment has some level of energy efficiency because they are motivated by agreements with WHEDA and U.S. Department of Housing and Urban Development. Two others mentioned their products generally have an ENERGY STAR rating. Another participant explained that they try to ensure their properties are as affordable as possible. As a result, owners are encouraged to install energy-efficient equipment, noting the longer-term cost-effectiveness of these products.

Challenges to Considering Upgrades

When asked about the biggest challenges in considering upgrades, five of the six participants reported that budget and costs are the biggest challenges in affordable housing. One explained that decisions around installing high-efficiency equipment often come down to cost, noting that rent in affordable housing is fixed and cannot be increased to offset higher equipment costs. Another respondent expanded on this idea, explaining that their company discusses capital expenditures annually, and that some years' budgets are more limited than others.

In addition to cost, another respondent cited compliance with funding and regulatory requirements as a significant challenge when considering equipment upgrades. They described a current project funded

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under the Buy America, Build America Act (BABA), which requires the use of equipment manufactured in the United States. This person reported difficulty identifying equipment that both meets domestic funding requirements and matches the efficiency of comparable products manufactured in other countries.

Heat Pump Perceptions

Participants were asked whether they had considered heat pumps as an alternative to baseboard heating. Of the seven participants who answered this question, three reported having heat pumps installed at their properties. Two said that heat pumps are standard in all new developments, while another installs them primarily in large multifamily buildings. A fourth provider reported actively researching heat pump options for future projects and specifically mentioned HEAR and HOMES rebates. One said they have not considered heat pumps and are unfamiliar with the technology's pros and cons.

Participants identified several advantages of heat pumps, including reduced maintenance needs and improved energy performance during extreme weather. Two (n=4) explained that heat pumps function as compact, all-in-one systems requiring less physical space. Another emphasized lower maintenance costs and ease of use for residents. Two additional respondents noted that heat pumps can reduce utility bills due to their higher efficiency, particularly during Wisconsin's severe winter conditions.

Concerns about heat pumps varied. One provider cited high upfront and purchase costs. Two others expressed skepticism about heat pump performance in extreme cold, noting that reduced effectiveness could be especially challenging for senior residents who are more sensitive to temperature fluctuations. Another provider described tenant conflicts arising from shared heat pump systems serving multiple units, prompting them to transition toward individual units to avoid disputes.

Respondents emphasized that monthly cost savings must be significant enough to justify installing a heat pump. Two of the nine respondents explained that affordability must remain the priority, given limited project budgets and tenant incomes often around 30% of the county's median income. In addition, building owners and managers said that they are more likely to consider installing heat pumps when upfront costs are offset. Four interviewees reiterated that maintaining affordability and adhering to strict budget constraints are central to their development process. These respondents all explained that rebates that reduce installation costs and lower long-term utility expenses are important for affordable housing providers to consider installing a heat pump.

Additional barriers stem from the regulatory and financial constraints inherent to affordable housing development, as noted previously. One participant explained that compliance requirements increase project complexity and cost. Another reiterated that limited capital budgets heighten the importance of tax credit awards and rebates, which are critical to advancing projects and supporting the adoption of technologies such as heat pumps.

Program Participation and Experience

All nine respondents reported that their experience with Focus on Energy's offering was extremely positive. Each participant reported that their Focus on Energy point of contact was helpful in explaining the process and presenting design recommendations.

"They have been helpful when strategizing to hit goals for savings."

-Affordable Housing Participant

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Two of the nine respondents explained that they enrolled in Focus on Energy early in the design phase, and that their involvement seemed premature. One stated they would have liked a month or two before Focus on Energy got involved, so their team could collaborate more and provide a starting point for Focus on Energy to consult. The other, who provided similar insight, explained that they enrolled in Focus on Energy too early in their project timeline and had not yet started discussing or planning the project's design requirements. This same participant said it was a waste to enroll that early because, as they began their design process, they had to continually seek feedback from Focus on Energy for each choice, rather than having pre-selected options that Focus on Energy could comment on all at once. On the other hand, two other participants said that involving Focus on Energy early in their project was extremely useful, as they received guidance and had time to contemplate ideas and other items.

Motivations to Participate

The interview then asked respondents to describe their experiences participating in Focus on Energy offerings as affordable housing providers. Five respondents (n=9) reported that funding requirements initially motivated their participation, noting that engagement with Focus on Energy was often required to access funding or tax credit awards. Several others explained that while participation began as a requirement, Focus on Energy incentives and rebates became an important motivator as projects progressed.

Three respondents explained that the Focus on Energy incentives were crucial to expanding project budgets, particularly given the typical financial constraints in affordable housing development. One respondent stated they are "always looking for help building these buildings," noting that the cost to construct affordable housing often exceeds the long-term value of the property and that any financial assistance would help improve project feasibility.

Four respondents also explained that guidance from energy efficiency experts at Focus on Energy was a key motivator for participation. One explained that technical advice and consultation from Focus on Energy staff are particularly useful when selecting products or equipment and identifying opportunities to improve building performance.

Upgrades installed by respondents through previous Focus on Energy participation varied by project. Three of the nine participants said they installed lighting packages recommended by Focus on Energy. Three also reported installing HVAC and water heating equipment based on Focus on Energy's recommendations, while two said they installed insulation measures suggested by Focus on Energy. Two respondents described receiving bundled upgrade options comprising multiple packages to choose from, aligned with project budget and requirements.

Participation Barriers

Four participants reported there were no barriers or program rules that made participation in Focus on Energy's offerings more difficult. The other five respondents identified several challenges, including

"We are always looking for help building these buildings. You could build an \$11 million building as an affordable building, and a year later, it could only be worth \$8 million. Because the rents that you're getting are not market rate, and they're not, they're not at par with what you could be charging to replace that building. So, any sort of help or money that we get to make a building pencil out is going to help us in the long run."

-Affordable Housing Participant

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limited or rigid budgets, navigating different requirements across multiple entities, and difficulty tracking changing rebate rules and timelines. One participant specifically urged better alignment across organizations involved in affordable housing, including WHEDA, the City of Madison, and Focus on Energy, to align their rules and regulations to streamline the process for affordable housing providers and reduce administrative burden.

Additional barriers mentioned included the challenges faced by architects and general contractors in staying current on rebate program timelines and requirements, which can result in missed deadlines and lost funding opportunities. Another respondent mentioned limited access to funding for nonprofit organizations, noting that nonprofit status can restrict eligibility for certain funding sources.

Suggested Improvements to Support Affordable Housing Providers

Participants were asked what would have made participation in Focus on Energy easier for affordable housing providers. Respondents' suggestions included the following:

- Offering more rebates and incentives to alleviate costs
- Offering guidance on ideal timing for when to engage with programs
- Connect WHEDA and Focus on Energy processes to bring clarity and streamline processes
- Addressing consistency across platforms
- Providing a list of efficient equipment that meets requirements

One respondent discussed BABA requirements and noted, "Having a list of equipment that is efficient, built in America, and that meets the BABA requirements would be really helpful."

Insights on Future Program Design and Support

Affordable housing owners and managers emphasized that financial feasibility is the primary factor shaping decisions about energy-efficient design. While they appreciate Focus on Energy's one-time incentives, many noted that ongoing rebates would better support long-term adoption, especially given limited budgets and the difficulty of financing maintenance and efficiency upgrades.

Respondents also emphasized the need for clearer, centralized information, such as a database outlining equipment costs, efficiency levels, and payback periods, to guide decision-making. They want to understand how specific design features contribute to green certifications and how those choices translate into meaningful operational savings for both owners and tenants. Another respondent noted their interest in a visual tool to understand different consumption patterns among units within buildings.

Respondents highlighted the value of practical tools that simplify decision-making, including trusted product ratings, guidance on prioritizing upgrades when only one improvement is affordable, and visualizations of energy use across different income-restricted units. Direct-install offerings were described as particularly helpful because they reduce administrative burden. Finally, participants expressed interest in staying informed about emerging technologies and receiving support for the rising costs associated with energy certifications as standards continue to evolve.

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When asked what support would be most useful, five respondents (n=9) identified rebates as the most crucial, citing their role in reducing upfront costs. Additional support throughout the program process was also viewed as valuable. One respondent noted that having a dedicated staff member who could advocate for their project and guide them through each step would significantly ease participation. Respondents also emphasized that reducing or removing qualification barriers is a meaningful incentive, particularly for projects that struggle to meet eligibility or registration requirements. One noted that the availability of more free offerings (such as previous free lightbulb offers) would alleviate issues where customers struggle to qualify for or register for programs.

Finally, participants discussed the types of support needed during the planning and implementation of energy upgrades; responses varied by respondent and by the composition of their project teams. Four of the nine respondents emphasized the need for guidance on selecting appropriate technologies and clarity on when to engage with Focus on Energy during the development process. Two respondents indicated that additional support is unnecessary for their projects, as they already work with architects and contractors familiar with energy efficiency programs and measures.

4.3.5. Ongoing Participant Satisfaction Surveys

Throughout CY 2025, the administrator invited participants to take a web-based satisfaction survey. Eight participants responded to the survey.

Awareness

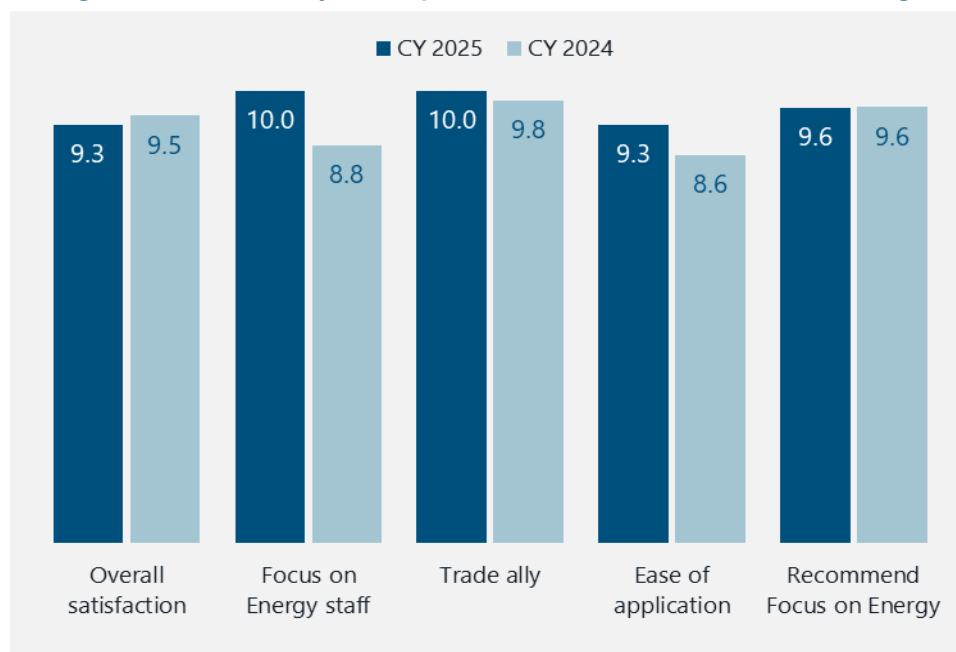
The survey asked participants how they learned about the Multifamily Program. In CY 2025, three of the seven respondents who could recall said they learned about it from Amazon, while two mentioned family, friends, or colleagues, and one apiece mentioned the manufacturer or distributor, and doing a web search.

Participant Experience

When asked about satisfaction with the program and the likelihood of recommending Focus on Energy, respondents rated on a scale of 0 to 10, where 10 indicated the highest satisfaction or likelihood and 0 the lowest.⁸ As Figure 27 shows, CY 2025 respondents gave the Multifamily Program an average overall satisfaction score of 9.3. Respondents were also generally satisfied with the ease of applying for incentives, with an average score of 9.3. Only two respondents rated their satisfaction with Focus on Energy staff, and they provided an average score of 10.0. Similarly, only one respondent rated their satisfaction with the trade ally they worked with, and that respondent gave a score of 10.

⁸ The number of participants who completed a survey does not always match the number of responses for each question, as some participants skipped or did not know answers to questions.

Figure 27. Multifamily Participant Satisfaction and Likelihood Ratings



Source: Multifamily and Business and Industry Program Participant Satisfaction Survey Questions. “Overall, how satisfied are you with your most recent experience with Focus on Energy?” (CY 2025 n=8; CY 2024 n=31). “How satisfied are you with the Energy Advisor or Focus on Energy staff member who assisted you with your project?” (CY 2025 n=2; CY 2024 n=10). “How satisfied are you with the contractor(s) that you worked with on this project?” (CY 2025 n=1; CY 2024 n=23). “How satisfied are you with the ease of submitting your rebate application?” (CY 2025 n=8; CY 2024 n=31). “How likely are you to recommend Focus on Energy to others?” (CY 2025 n=8; CY 2024 n=31).

Net Promoter Score

Using the survey data, the evaluation team calculated an NPS based on customers’ likelihood to recommend Focus on Energy. The NPS is expressed as an absolute number between -100 and +100, representing the difference between the percentage of promoters (respondents giving a rating of 9 or 10) and detractors (respondents giving a rating of 0 to 6). High NPS scores (+70 or higher) are theoretically predictive of customer behaviors, such as participating in another offering, implementing additional energy improvements, and referring Focus on Energy offerings to others. The Multifamily Program’s NPS was +100 for CY 2025 (n=8), which was higher than the +87 NPS for this program in CY 2024.

Awareness of Utility Partnership

The survey asked participants whether they were aware that the Multifamily Program was offered in partnership with their local utility before they received the satisfaction survey. Three out of eight respondents were aware in CY 2025.

The survey also asked if Focus on Energy offerings affected their opinion of their utilities. Of the six respondents who answered this question, four said that their opinion had become *much more favorable*, and two said that their opinion *did not change*.

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Participant Feedback and Suggestions for Improvement

The survey asked participants if they had any comments or suggestions to improve the program. Of the eight participants who responded to the survey, two provided open-ended feedback. Both mentions were positive, with one respondent calling the program “great” and another praising an individual they worked with on their project. None of the respondents offered suggestions for improvement.

In CY 2025, the satisfaction survey included an open-ended question soliciting comments on participants’ experience with trade allies. One participant responded to the question but did not offer feedback or suggestions.

4.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a demand-side management offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III includes a description of the TRC test.

Table 29 lists the CY 2025 incentive costs for the Residential Multifamily Program.

Table 29. CY 2025 Residential Multifamily Incentive Costs

Offering	Incentive Costs
Direct Install	\$444,429
Online Marketplace	\$1,847,078
Total	\$2,291,507

The evaluation team found that the CY 2025 Residential Multifamily Program was cost-effective (1.93). Table 30 lists the evaluated costs and benefits.

Table 30. CY 2025 Residential Multifamily Costs and Benefits^a

Cost and Benefit Category	Total
Costs	
Administration Costs	\$120,353
Delivery Costs	\$1,323,854
Incremental Measure Costs	\$18,306,932
Total Non-Incentive Costs	\$19,751,139
Benefits	
Electricity Benefits (kWh)	\$6,567,003
Capacity Benefits (kW)	\$7,811,472
Transmission and Distribution (T&D) Benefits (kW)	\$2,242,199
Gas Benefits	\$5,634,687
Emissions Benefits	\$15,779,841
Total TRC Benefits	\$38,035,201
Net TRC Benefits	\$18,284,062
TRC Benefit/Cost Ratio	1.93

^a The Department of Administration (DOA) Solar/Heat Pump Pilot spans the Multifamily and Renewable Rewards Programs. Verified savings are allocated to each program based on the type of equipment installed. For the cost-effectiveness analysis, \$35,000 in DOA pilot solar PV incentives are allocated to Residential Renewables; the remainder of pilot costs are allocated to the Multifamily Program.

4.5. Outcomes and Recommendations

The evaluation team offers the following outcomes and recommendations based on findings from the CY 2025 evaluation.

Outcome 1. Rebates are critical to advancing affordable housing efficiency projects. Interviewed affordable housing participants repeatedly emphasized the importance of sufficient funding for affordable housing projects and energy efficiency measures and technologies (installations and upgrades), as projects tend to have limited budgets. Participants described rebates as essential for improving project feasibility and facilitating access to and installation of higher-efficiency equipment and measures within strict financial/funding constraints and regulatory requirements.

Recommendation 1. Strengthen and expand financial incentives to better support multifamily and affordable housing projects. Financial constraints were frequently cited by participants, with rebates identified as an impactful tool for offsetting capital constraints. Consider offering higher rebates for priority measures to alleviate upfront costs and ease tight budgets.

Outcome 2. Participants are generally satisfied with Focus on Energy's offerings but would benefit from clearer, more accessible information about program requirements, available support, and how that support applies at different stages of the project lifecycle. Across both eEDA participants and affordable housing providers, interview respondents reported positive experiences and high overall satisfaction with Focus on Energy staff and programs. However, respondents described challenges in

understanding program requirements, identifying eligible equipment, navigating rules and timelines across various entities, and locating clear information on offerings, rebates, and contacts.

Recommendation 2a. Improve the clarity and accessibility of program materials by clearly outlining participation requirements, eligible equipment, available rebates, and key process steps. Increase marketing efforts to boost awareness of the offering and education, particularly among developers.

Recommendation 2b. Simplify qualification requirements where possible to make participation more accessible to nonprofit and income-restricted developers. Align program rules and timelines with other regulatory requirements and major entities to reduce confusion and prevent missed opportunities due to conflicting requirements.

Outcome 3. The timing of enrollment and type of engagement can influence the value and the benefits participants receive from the program, the usefulness of the offering support, and the ability to implement recommendations. Interview findings indicate that engagement earlier in the project lifecycle, particularly during the pre-design and design phases, can be most impactful for establishing project goals, framing decision-making, and considering long-term cost and performance objectives. However, some respondents who engaged very early reported uncertainty about the immediate applicability of support at that stage. Other respondents who enrolled later in the design or construction phases noted limited ability to incorporate and implement recommendations. These findings suggest that while early involvement is valuable, the nature and focus of support at different project stages can influence participants' perceptions of timing and usefulness.

Recommendation 3. Enhance guidance on both when and how participants should engage with Focus on Energy across the project development process. Clearly communicate recommended engagement points and describe how the focus of program support may evolve across project phases. This may include, for example, guidance ranging from early goal setting and total cost of ownership considerations to more detailed design and equipment decisions. Guidance should reflect differences across project types and clarify how early engagement can help establish principles and priorities aligned with goals, even when specific design decisions are not yet finalized. Incorporate this guidance into marketing materials and website content so participants can better understand how to align program engagement with project milestones to maximize the value of support provided.

Outcome 4. Participants value expert support and guidance from Focus on Energy to aid in project design and equipment selection. Both eEDA participants and affordable housing providers emphasized the importance of technical guidance from Focus on Energy staff, including support for design decisions (or validation of these decisions), equipment selection and performance, and compliance with program and funding requirements. Respondents indicated that this support helps validate design choices, improve confidence in project decisions, and reduce uncertainty.

Recommendation 4. Continue to offer dedicated program liaisons who can advocate for projects, answer questions, and guide developers through the project lifecycle from design through implementation. Enhance technical guidance and project-level support by strengthening tailored recommendations on which technologies best fit specific building types, climates, and budget constraints.

Outcome 5. Clearer guidance on the benefits and appropriate timing of common energy efficiency upgrades could support improved planning, early prioritization of energy efficiency measures, and project-specific decision-making in multifamily and affordable housing developments. Express EDA participants and affordable housing interview respondents indicated that while they recognize the general value of energy efficiency, they could benefit from more practical and project-specific guidance on when certain upgrades (for example, insulation and air sealing) should happen and how those measures translate into project costs, savings, and overall affordability, as well as benefits for building owners and tenants. Respondents expressed interest in clearer information on equipment costs, efficiency levels, and expected payback to support decision-making within tight project budgets.

Recommendation 5. Offer guidance on the benefits and timing of common energy efficiency upgrades for multifamily and affordable housing projects. Consider developing clear, centralized, easy-to-access guidance that explains when common or impactful energy-efficient upgrades are generally recommended. Include information that respondents identified as most useful for planning and decision-making, including expected costs, anticipated savings, efficiency levels, and payback period considerations. Integrating this information into offering materials on websites, etc., could support more informed project planning, help developers prioritize upgrades within tight budget and funding constraints, and inform future planning.

Outcome 6. Heat pumps represent a promising growth opportunity for affordable housing, but adoption remains constrained by cost concerns and uncertainty about performance and applicability. Affordable housing providers expressed interest in heat pumps and identified potential benefits, including reduced maintenance needs, improved energy performance, and greater space efficiency. However, they also expressed concerns about upfront costs, performance in extreme cold temperatures, tenant comfort, and overall affordability, suggesting these considerations hinder broader adoption in affordable housing.

Recommendation 6a. Provide targeted support to address cost and performance concerns related to heat pumps in affordable housing projects. Consider targeted financial support for heat pump installations to help offset upfront costs and improve feasibility.

Recommendation 6b. Consider fielding an enhanced marketing campaign and strengthening informational materials to address common heat pump concerns raised by respondents. Ensure materials clearly provide accessible information on cold-climate performance, tenant comfort implications, operating cost impacts, and appropriate applications for different building sizes and types. Examples from comparable affordable housing projects could further support developers and other decision-makers.

5. Residential New Construction Program

The Residential New Construction Program provides Wisconsin builders with technical training and support, as well as incentives, to construct homes that meet Focus on Energy’s prescriptive performance and modeled energy performance requirements. Continuing in CY 2025, the Residential New Construction Program included two additional opportunities for participation:

- The New Manufactured Homes Pilot incentivized retailers to sell ENERGY STAR® and Department of Energy Zero Energy Ready manufactured homes, promoting more efficient construction practices.
- The Income-Qualified Bonus provided additional incentives for home builders constructing program homes for income-qualified customers.

Additional details about the program design are provided in the *Process Evaluation* section of this chapter.

In CY 2025, APTIM administered the Residential New Construction Program, and Performance Systems Development implemented it.

Table 31 lists actual spending, savings, participation, and cost-effectiveness of the Residential New Construction Program in CY 2025.

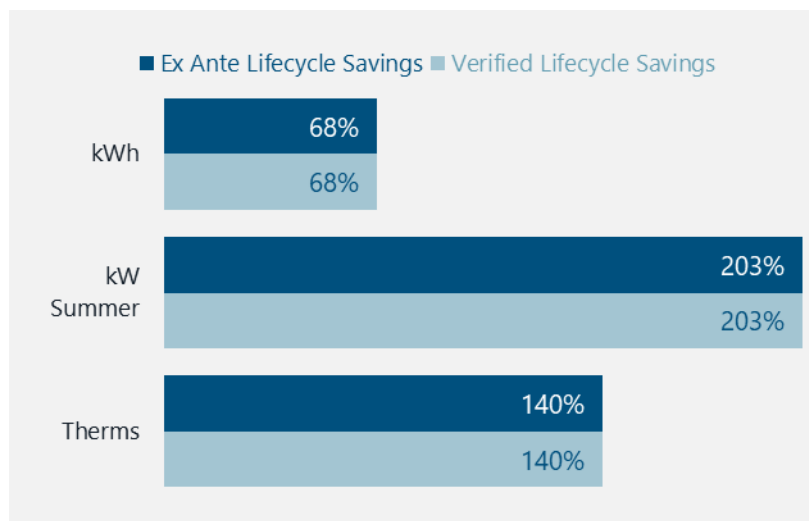
Table 31. CY 2025 Residential New Construction Summary

Item	Units	CY 2025
Incentive Spending	\$	\$4,053,964
Participation	Number of Participants	2,711
Verified Gross Lifecycle Savings	kWh	198,873,977
	kW Summer	2,101
	kW Winter	798
	therms	20,518,706
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%
Annual NTG Ratio	% (MMBtu)	76%
Net Annual Savings	kWh	473,719
	kW Summer	154
	kW Winter	57
	therms	671,149
Net Lifecycle Savings	MMBtu	2,061,945
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	6.70

5.1. Achievement Against Goals

The program exceeded two of three fuel-specific goals in CY 2025, achieving 203% of its summer kW goal, 140% of its natural gas (therms) savings goal, and 68% of its kWh goal. Figure 28 shows the percentage of gross lifecycle savings goals achieved by the Residential New Construction Program in CY 2025.

Figure 28. CY 2025 Residential New Construction Achievement of Gross Lifecycle Savings Goals



The 100% *ex ante* gross lifecycle savings reflect the implementer’s contract goals for CY 2025. Verified gross lifecycle savings contribute to the administrator’s portfolio-level goals. Winter kW goals were not established for CY 2025.

5.2. Impact Evaluation

This section describes the methodology the evaluation team used to evaluate the Residential New Construction Program and presents the findings from the CY 2025 impact evaluation.

5.2.1. Impact Evaluation Methodology

Table 32 lists the specific data collection activities and sample sizes used in the impact evaluation of the Residential New Construction Program. Additional details about these activities are below.

Table 32. CY 2025 Residential New Construction Impact Evaluation Activities and Sample Sizes

Activity	Sample Size
Tracking Database Review	Census
NTG Assessment of Program Homes	Census
Market Effects Calculation for Non-Program Homes	Census

Tracking Database Review

In CY 2025, the evaluation team reviewed the tracking data in the SPECTRUM database to verify gross savings from the program. The review involved two tasks:

- Ensuring that total savings and activity in SPECTRUM matched the totals reported by the administrator
- Checking for complete and consistent application of data fields (including measure names, application of first-year savings, and application of effective useful lives)

NTG Assessment of Program Homes

In CY 2025, the evaluation team updated the Residential New Construction NTG by applying the certification-level results of the CY 2019 NTG analysis to CY 2025 program homes. The CY 2019 evaluation included a comprehensive analysis of energy consumption/billing data of newly constructed Focus on Energy-certified and non-certified homes. The study found higher NTG ratios in program homes built at higher certification levels (i.e., percentages exceeding code requirements). For CY 2025, the evaluation team applied the tiered NTG ratios to program homes based on their certification level.

Table 33 lists the electric and natural gas NTG ratios that the team applied from the CY 2019 billing analysis to the CY 2025 program homes. The team grouped these NTG ratios by certification levels that were effective in the CY 2019 Residential New Construction Program. Because the CY 2025 program did not use this same incentive structure (see Table 45), the evaluation team used each program home’s specific certification rating to apply the NTG ratios from Table 33.

Table 33. CY 2025 Residential New Construction NTG Ratios by Savings Tier

Savings Type	Certification Level ^a (% Better than Code)	NTG Ratio
Electric	25% - 29.9% ^a	-181%
	30% - 34.9%	-48%
	35% - 99.9%	14%
Natural Gas	25% - 29.9% ^a	-23%
	30% - 34.9%	11%
	35% - 99.9%	23%

^a Percentage based on the CY 2019 certification level.

Market Effects Calculation for Non-Program Homes

To account for the program’s historical impact on the residential new construction market in Wisconsin, the evaluation team applied results from the Quadrennium III market effects analysis to non-program homes constructed in CY 2025. These market effects savings result from non-program homes are now being built more efficiently due to the program’s long-standing impact on the Wisconsin market. Although it was decided that electric market effects savings would no longer be applied beyond CY 2023, the evaluation team determined that natural gas market effects remain applicable for the CY 2025 evaluation. The team combined market effects savings with the net savings of program homes to calculate the final CY 2025 net savings for the program.

5.2.2. Verified Gross Savings Results for Residential New Construction

Table 34 lists the CY 2025 first-year and lifecycle realization rates for the Residential New Construction Program. Overall, the program achieved a verified first-year realization rate of 100%, weighted by total energy savings (MMBtu). For standard Residential New Construction program homes, the evaluation team assumed a 100% realization rate for first-year and lifecycle savings. For New Manufactured Home Pilot savings, the team applied deemed savings to the approved 2024 New Manufactured Homes work paper. For most measures, *ex ante* savings appeared to align with the deemed savings outlined in the 2024 work

paper, which resulted in a 100% realization rate for those measures. However, *ex ante* winter kW savings did not align with the TRM, resulting in a 142% realization rate.

Table 34. CY 2025 Residential New Construction First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate				
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	kW Summer	kW Winter	therms	MMBtu
Residential New Construction	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Manufactured Homes Pilot	100%	100%	142%	100%	100%	100%	100%	142%	100%	100%
Total	100%	100%	101%	100%	100%	100%	100%	101%	100%	100%

Table 35 lists verified first-year and lifecycle savings for the program.

Table 35. CY 2025 Residential New Construction First-Year and Lifecycle Gross Verified Energy Savings

	kWh	kW Summer	kW Winter	therms	MMBtu
Residential New Construction					
Verified First-Year Savings	6,387,144	1,920	759	622,967	84,090
Verified Lifecycle Savings	191,614,337	1,920	759	18,689,006	2,522,689
Manufactured Homes Pilot					
Verified First-Year Savings	241,988	181	39	60,990	6,925
Verified Lifecycle Savings	7,259,640	181	39	1,829,700	207,740
Total Residential New Construction					
Verified First-Year Savings	6,629,132	2,101	798	683,957	91,014
Verified Lifecycle Savings	198,873,977	2,101	798	20,518,706	2,730,429

Table 36 shows the *ex ante* gross savings for the Residential New Construction Program.

Table 36. CY 2025 Residential New Construction Ex Ante Gross Savings

	kWh	kW Summer	kW Winter	therms	MMBtu
Residential New Construction					
First-Year Gross Savings	6,387,144	1,920	759	622,967	84,090
Lifecycle Gross Savings	191,614,337	1,920	759	18,689,006	2,522,689
New Manufactured Homes Pilot					
First-Year Gross Savings	241,988	181	28	60,990	6,925
Lifecycle Gross Savings	7,259,640	181	28	1,829,700	207,740
Total Residential New Construction					
First-Year Gross Savings	6,629,132	2,101	787	683,957	91,014
Lifecycle Gross Savings	198,873,977	2,101	787	20,518,706	2,730,429

5.2.3. Annual Achievements

In CY 2025, the Residential New Construction Program continued to increase the average savings per certified home. Table 37 shows the number of homes certified by the program, verified lifecycle savings for CY 2025, and average verified total savings (MMBtu) per home.

**Table 37. Residential New Construction
Per-Home Verified Lifecycle Energy Savings (MMBtu) by Calendar Year**

Program Year	Number of Homes Certified	Verified Lifecycle kWh Savings	Verified Summer kW Savings	Verified Winter kW Savings	Verified Lifecycle therm savings	Total Verified Lifecycle MMBtu Savings	Average Verified Lifecycle MMBtu per Home
CY 2019	2,382	85,789,920	765	N/A	14,000,850	1,692,800	711
CY 2020	2,259	93,451,159	759	N/A	13,339,004	1,652,756	732
CY 2021	2,488	128,995,699	955	N/A	14,589,788	1,899,112	763
CY 2022	2,418	172,444,902	1,153	N/A	14,537,310	2,042,113	845
CY 2023	2,146	165,913,082	1,092	N/A	13,289,988	1,895,094	883
CY 2024	2,138	146,416,572	1,542	N/A	14,554,363	1,955,010	914
CY 2025	2,540	191,614,337	1,920	759	18,689,006	2,522,689	993

Figure 29 shows verified gross lifecycle savings by certification tier for CY 2025. The majority (87%) of program savings (MMBtu) were in the Level 1 (30% above code) tier. This tier also includes homes for which builders received the income-qualified bonus.

**Figure 29. CY 2025 Residential New Construction
Verified Gross Lifecycle Energy Savings (MMBtu) by Certification Tier**

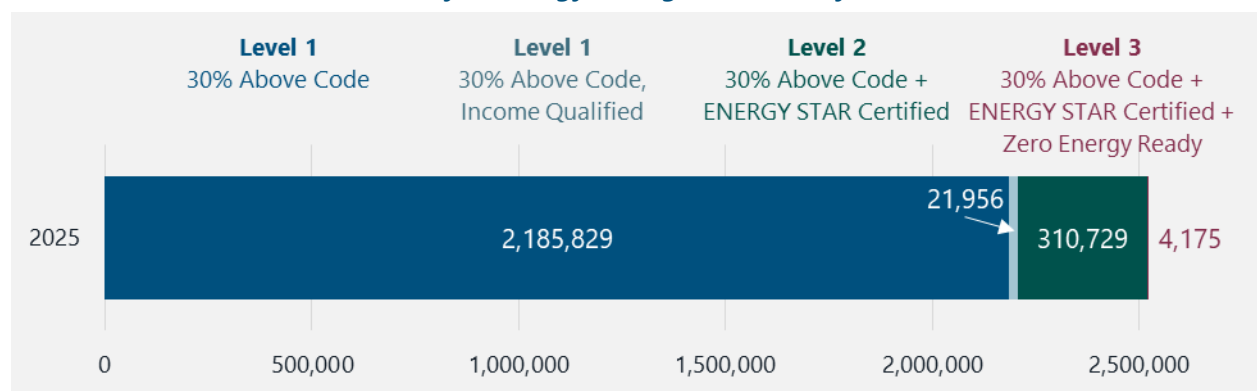
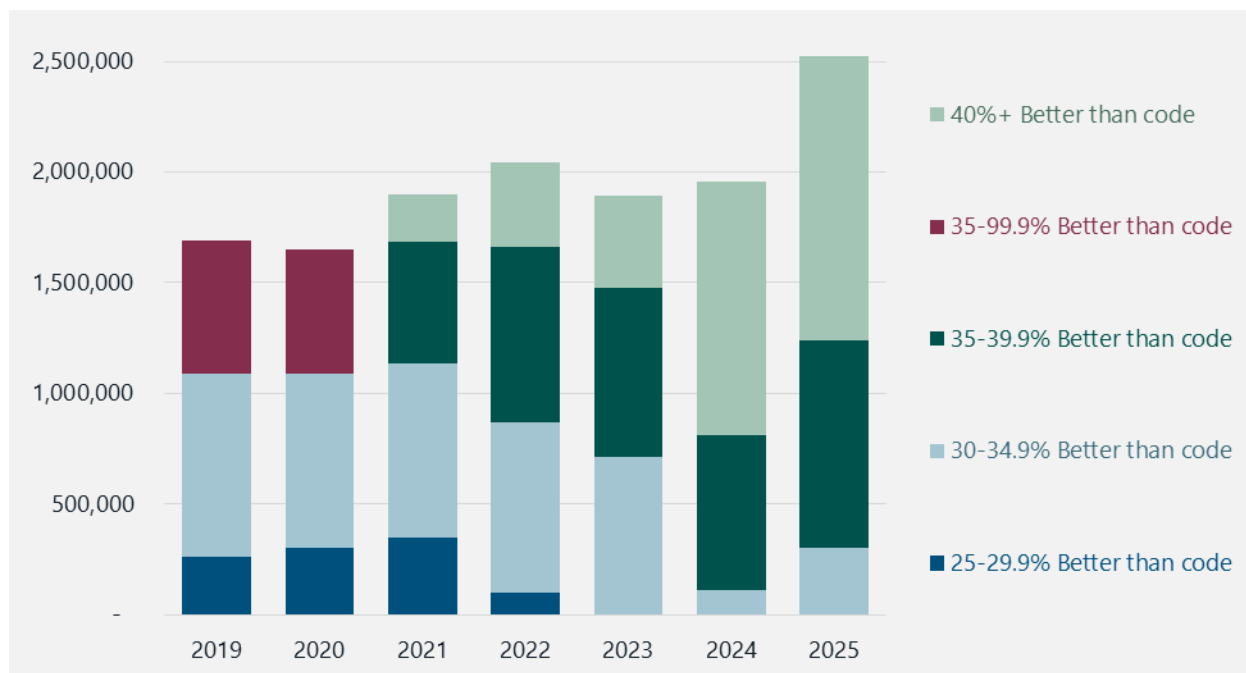


Figure 30 shows how CY 2025 verified gross lifecycle savings compared to previous years by the percentage of savings above code. It illustrates that the percentage of savings from higher certification tiers (about 51%) has been increasing since CY 2021.

**Figure 30. Residential New Construction
Verified Gross Lifecycle Energy Savings (MMBtu) by Performance Above Code**



5.2.4. Verified Net Savings Results for Residential New Construction Program

To calculate net savings for the Residential New Construction Program, the evaluation team updated the program’s NTG ratios using a combination of the CY 2025 tracking data, CY 2019 billing analysis adjustments, and CY 2024 New Manufactured Homes Pilot interview results. The team also applied natural gas market effects determined during the CY 2019 evaluation and incorporated NTG ratios for manufactured homes based on CY 2024 interviews with retailers and communities. As shown in Table 38, the program’s overall NTG ratio was 18% without market effects, weighted by first-year MMBtu savings, and the NTG was 76% with market effects.

Table 38. CY 2025 Residential New Construction First-Year Net Savings and NTG

	Total First-Year Gross Verified Savings (MMBtu)	Total First-Year Net Savings (MMBtu)	NTG Ratio
Without Market Effects	91,014	15,992	18%
With Market Effects	91,014	68,731	76%

NTG Assessment of Program Homes

The evaluation team updated the Residential New Construction NTG ratios for standard program homes using the CY 2025 program tracking data and the net adjustments from the CY 2019 billing evaluation. Table 39 and Table 40 show the share of program homes and net adjustments for each certification level. The updated electric NTG ratio was 7%, and the updated therm NTG ratio was 22%. CY 2025 marks the

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first year that electric net savings are positive, driven by the increasing share of program homes in the highest certification tiers.

Table 39. CY 2025 Residential New Construction NTG for Electricity

Certification Level	% above Code	Number of Homes in Bin	Gross kWh (First-Year) Savings	Net Adjustment	Net kWh Savings
Certification Level 1	25-29.9%	0	0	-181%	0
Certification Level 2	30-34.9%	409	736,315	-48%	-353,431
Certification Level 3	35-39.9%	1,077	2,386,860	14%	334,160
Certification Level 4	40%+	1,054	3,263,970	14%	456,956
Total		2,540	6,387,144	7%	437,685

Table 40. CY 2025 Residential New Construction for Natural Gas

Certification Level	% above Code	Number of Homes in Bin	Gross therms (First-Year) Savings	Net Adjustment	Net therm savings
Certification Level 1	25-29.9%	0	0	-23%	0
Certification Level 2	30-34.9%	409	75,754	11%	8,333
Certification Level 3	35-39.9%	1,077	230,196	23%	52,945
Certification Level 4	40%+	1,054	317,017	23%	72,914
Total		2,540	622,967	22%	134,192

NTG Ratio for Manufactured Homes

To calculate net savings for the New Manufactured Homes Pilot, the evaluation team used NTG results from the CY 2024 retailer and community interviews.⁹ The team then applied the NTG ratio to the Manufactured Homes Pilot, which resulted in the net savings shown below in Table 41.

Table 41. CY 2025 Manufactured Homes First-Year Net Savings and NTG

Offering	Total First-Year Verified Gross Savings (MMBtu)	Total First-Year Net Savings (MMBtu)	NTG Ratio
New Manufactured Homes Pilot	6,925	762	11%

Market Effects for Non-Program Homes

In CY 2019 and CY 2020, the evaluation team conducted research to estimate market effects for the Residential New Construction Program, including kWh, kW, and therms-per-home market-effect savings for a standard non-program home constructed in Wisconsin.¹⁰ To determine these per-home market

⁹ Additional details about NTG calculation for the New Manufactured Homes Pilot are included in the CY 2024 Focus on Energy Evaluation Report.

¹⁰ The term *standard non-program home* refers to a typical newly constructed Wisconsin home that did not participate in the Residential New Construction Program.

effects, the team convened an expert Delphi panel to assess whether building practices for standard, non-program new homes were affected by the program.¹¹ This feedback informed the characteristics of a counterfactual non-program home—that is, a non-program home that would have been built without any influence from the program—and modeled its energy use.

Per-home market effects savings are the difference between the modeled energy consumption of a counterfactual non-program home and the modeled energy consumption of a standard non-program home. These savings should be considered new savings realized for the program since they represent program-induced energy savings in the Wisconsin residential new construction market that have not previously been attributed to program spending (past or present).

Table 42 shows the per-home first-year market effects savings, determined by modeling the energy consumption of standard and counterfactual non-program homes. The overall per-home market effects savings are 770 kWh, 0.15 kW, and 49 therms per year. Efficient lighting (LEDs) and electronically commutated motor (ECM) furnace fans drove electric market effects savings, while efficient gas furnaces and water heaters were the primary contributors to natural gas savings.

Table 42. CY 2025 Residential New Construction Per-Home First-Year Market Effects Savings

Electric/Natural Gas	Standard Non-Program Home Consumption	Counterfactual Non-Program Home Consumption	Market Effects Savings
kWh	8,996	9,766	770
kW	2.56	2.72	0.15
therms	771	820	49

In CY 2024, the evaluation team stopped including kWh market effect savings because updates to federal lighting and furnace standards required new equipment to be as efficient as LEDs and ECM furnace fans. However, regulations for natural gas furnaces and water heating have not changed since 2020. Builder interviews conducted in CY 2024 indicated that natural gas market effects are ongoing. Therefore, the evaluation team continued to apply therm market effects to non-program homes.

To calculate CY 2025 market effects for non-program homes, the evaluation team multiplied the per-home market effects savings by 10,763, which represents the total number of non-program homes constructed in Wisconsin in 2025.¹² Table 43 shows the first-year and lifecycle market effects savings for non-program homes. The team added these market effects savings to net savings for program homes to determine the total net savings for the program.

¹¹ Full details about the Delphi panel process are available in the CY 2020 Focus on Energy Evaluation Report.

¹² New home permits by county sourced from the United States Department of Housing and Urban Development's Office of Policy Development and Research. Permit data are available here: <https://www.huduser.gov/portal/datasets/socds.html>

**Table 43. CY 2025 Residential New Construction
First-Year Market Effects Savings for Non-Program Homes**

	First-Year Market Effects Savings			
	kWh	kW	therms	MMBtu
First-Year Market Effects Savings	0	0	527,387	52,739
Lifecycle Market Effects Savings	0	0	15,821,610	1,582,170

5.3. Process Evaluation

The CY 2025 process evaluation focused on monitoring program activity by reviewing program documentation and program home-building characteristics. Table 44 lists CY 2025 process evaluation activities, followed by brief descriptions of these activities.

**Table 44. CY 2025 Residential New Construction
Process Evaluation Data Collection Activities and Sample Sizes**

Activity	Sample Size
Program Documentation Review	✓
Program Home Database Update	2,249 homes

Program Documentation Review

The evaluation team reviewed the implementation and marketing plans for the Residential New Construction Program to understand the program's structure and its implementation in CY 2025. The team also reviewed miscellaneous documentation throughout the year, including *ad hoc* updates from the program administrator and the administrator's quarterly performance reports to the PSC, to understand program updates and progress in CY 2025.

Program Home Database Update

In CY 2019, the evaluation team created a database of historical characteristics of participating homes using REM/Rate software files from the implementer.¹³ Each year since then, the team has collected REM/Rate files and updated the database to show how program home characteristics have evolved over time.

5.3.1. Program Design and Delivery

Focus on Energy delivers the Residential New Construction Program throughout Wisconsin through the administrator, implementer, participating trade allies (home builders), and building performance consultants (BPCs) affiliated with the program. Participating home builders can certify homes through the program and receive incentives for homes that are at least 30% more energy efficient than the current

¹³ REM/Rate is the modeling software used to calculate the energy consumption and energy savings of homes certified by the Residential New Construction Program.

Wisconsin Uniform Dwelling Code, as determined by third-party BPCs using REM/Rate energy modeling software.

Participating home builders are paired with BPCs, who guide them on using more energy-efficient building techniques and then model and verify the new homes' energy performance using REM/Rate. Focus on Energy also offers training on advanced building techniques to help home builders meet program requirements and construct more efficient homes. This training is also open to nonparticipating builders and subcontractors.

In CY 2025, the Residential New Construction Program continued to offer the incentive structure it launched in CY 2023. The program design includes three incentive levels (starting at 30% above code) and a bonus for income-qualified homes. Table 45 lists CY 2025 incentives and participation for each home certification level. In CY 2025, 91% of participating homes were certified at the 30% Above Code certification level.

Table 45. CY 2025 Residential New Construction Certification Level Incentives and Participation

Certification Level	CY 2025 Incentives (Per-MMBtu Savings)	CY 2025 Participation
30% Above Code	\$45	2,302
30% Above Code + ENERGY STAR Certification	\$50	207
30% Above Code + ENERGY STAR + Zero Energy Ready Certification	\$60	2
30% Above Code + Income-Qualified Additive Per MMBtu Saved (bonus)	\$50	29

Though certification levels are expressed as a percentage above code, the program measures the energy savings of participating homes against those of a market baseline home. In CY 2024, the program updated this market baseline home to reflect home characteristics from the evaluation team's CY 2022 market characterization study.¹⁴

New Manufactured Homes Pilot

Continuing in CY 2025, the Residential New Construction Program included a New Manufactured Homes pilot designed to push Wisconsin's manufactured homes market toward more efficient construction practices. The pilot, which ended in December 2025, provided incentives to manufactured home retailers and communities for sales of ENERGY STAR- or Department of Energy Zero Energy Ready-certified manufactured homes. Four incentive options were available to participants and offered on a per-home basis. Table 46 shows the incentive levels and participation for the pilot in CY 2025.

¹⁴ Cadmus. July 2022. *2020 Residential New Construction Baseline Study*. <https://focusonenergy.com/evaluation-reports/2020-residential-baseline-study-report>

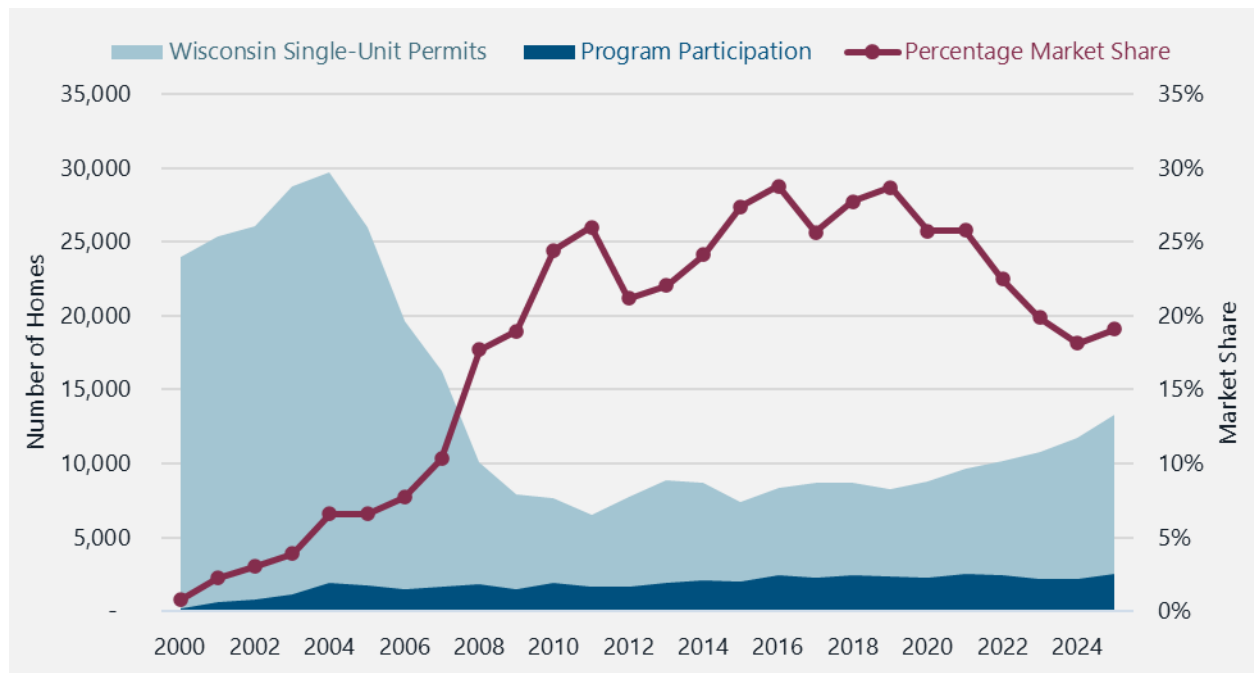
Table 46. CY 2025 New Manufactured Homes Incentives and Participation

Certification Level	CY 2025 Incentives (Per Home)	CY 2025 Participation
ENERGY STAR-certified, Single-Floor Units	\$1,000	64
ENERGY STAR-certified, Double-Floor Units	\$1,250	15
Zero Energy Ready Home-certified, Single-Floor Units	\$1,500	81
Zero Energy Ready Home certified, Double-Floor Units	\$1,750	11

5.3.2. Residential New Construction Activity

The evaluation team tracks market share and other new construction metrics to monitor the Residential New Construction Program's market effects. The number of new construction permits issued throughout the state has steadily increased since CY 2020, following about 10 years of relatively low permits. In CY 2025, a total of 13,303 permits were issued in Wisconsin. This is 1,181 more permits than were issued in CY 2024. At the same time, the number of program homes has stayed relatively stable. The percentage of program homes among total permits was 19% in CY 2025. Figure 31 shows the historical participation rate and market share of the Residential New Construction Program as a percentage of single-family new construction permits since CY 2000.

Figure 31. Residential New Construction Participation and Market Share (CY 2000-CY 2025)

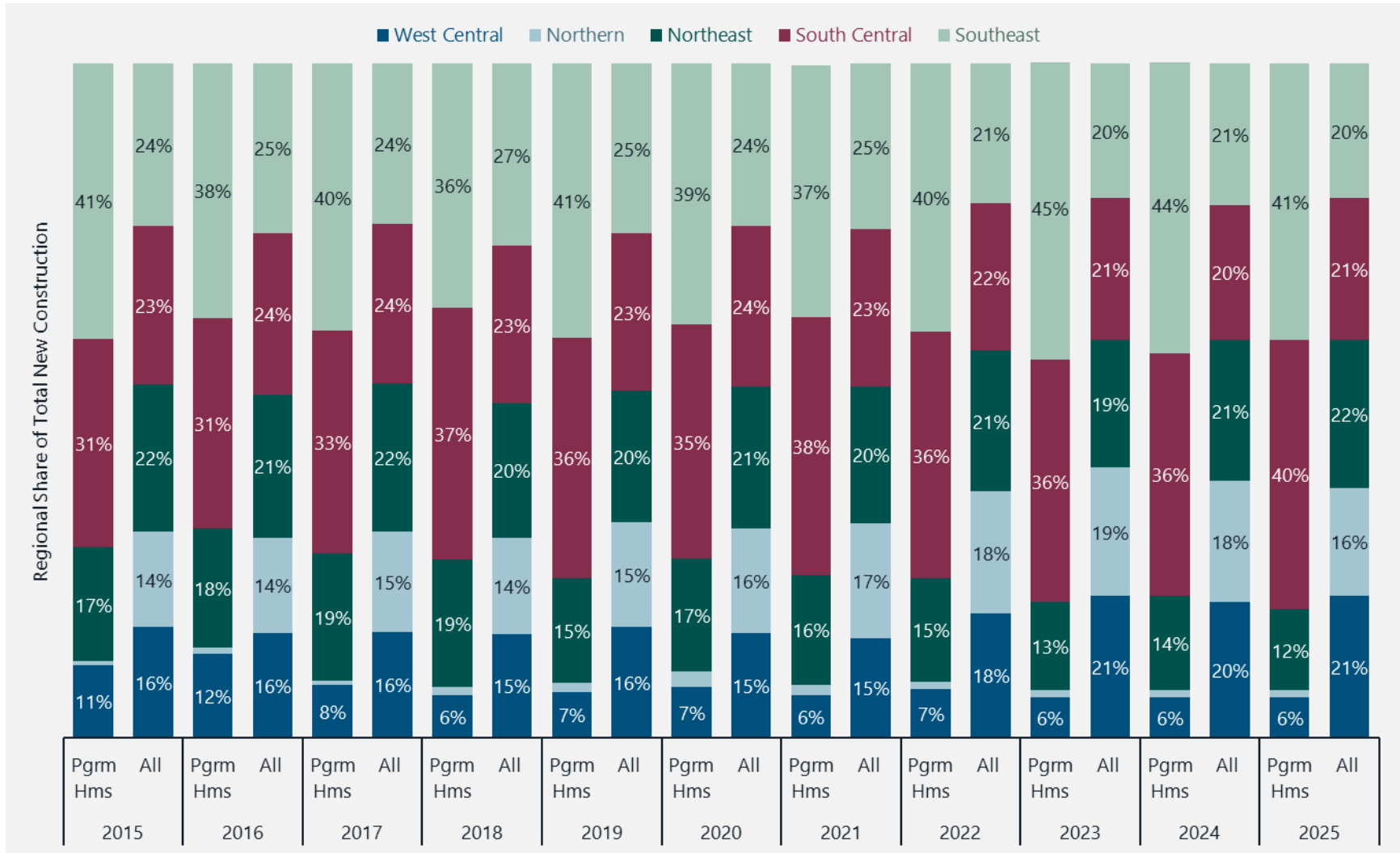


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Between CY 2016 and CY 2025, the share of statewide residential new construction in urban counties has decreased from 71% to 55%.¹⁵ In comparison, the share of Focus on Energy-certified homes built in urban areas has remained steady over the same period, ranging from 88% to 90%. Figure 32 shows the overall regional share of Residential New Construction homes and new construction in Wisconsin. The figure illustrates that Residential New Construction homes are disproportionately concentrated in Southeast (41%) and South-Central Wisconsin (40%), which include the large urban areas of Milwaukee (Southeast) and Madison (South Central). Northern and West Central Wisconsin have a smaller percentage of Residential New Construction homes than the overall market. Notably, several rural electric cooperatives in the Northern and West Central regions of Wisconsin do not participate in Focus on Energy.

¹⁵ The evaluation team used urban/rural county designations from the Wisconsin Department of Health Services. "WISH: Urban and Rural Counties." Accessed February 2026. www.dhs.wisconsin.gov/wish/urban-rural.htm

Figure 32. Regional Share of the New Construction Market (CY 2015-CY 2025)



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5.3.3. Building Practices in Program Homes

As in previous evaluations, the evaluation team collected and tracked data on building practices in program homes as part of the CY 2025 Residential New Construction Program. Additional details on CY 2025 findings and long-term trends are provided in Appendix G. Residential New Construction Building Practices in Volume III.

5.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a demand-side management (DSM) offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III includes a description of the TRC test. Table 47 lists the CY 2025 incentive costs for the Residential New Construction Program.

Table 47. CY 2025 Residential New Construction Incentive Costs

Offering	Incentive Costs
New Construction	\$3,828,427
Manufactured Homes	\$223,500
Total	\$4,053,964

The evaluation team found that the CY 2025 Residential New Construction Program was cost-effective (6.70). Table 48 lists the evaluated costs and benefits.

Table 48. CY 2025 Residential New Construction Costs and Benefits

Cost and Benefit Category	Total
Costs	
Administration Costs	\$212,920
Delivery Costs	\$2,342,064
Incremental Measure Costs	\$71,067
Total Non-Incentive Costs	\$2,626,051
Benefits	
Electricity Benefits (kWh)	\$245,926
Capacity Benefits (kW)	\$675,811
T&D Benefits (kW)	\$192,957
Gas Benefits	\$8,515,522
Emissions Benefits	\$7,969,415
Total TRC Benefits	\$17,599,631
Net TRC Benefits	\$14,973,579
TRC Benefit/Cost Ratio	6.70

5.5. Outcomes and Recommendations

The evaluation team identified the following outcomes and recommendations for the Residential New Construction Program.

Outcome 1. In CY 2025, the program continued to see increasing savings per home and growth in ENERGY STAR and Zero Energy Ready Certification levels. Savings per program home have steadily increased since CY 2019, and the share of program homes at 40% or more better than code has also increased since this data was first tracked in CY 2021. Although only 8% of program homes were certified at the ENERGY STAR level, the number of ENERGY STAR homes increased 34% between CY 2024 and CY 2025. The program also had two homes certified at the Zero Energy Ready level in CY 2025 compared to none in CY 2024. While these trends are positive, the majority of homes remain at the lowest certification level (30% above code). The program administrator reported that limited participation in the higher certification levels is due to the added cost of achieving those certifications.

Recommendation 1a. Considering sharing success stories from ENERGY STAR and Zero Ready builders and homes to help others understand the benefits of building at higher levels.

Recommendation 1b. Monitor participation by certification level and consider adjusting incentives for upper tiers if participation does not increase. There may be an opportunity to continue refining the per MMBtu incentive rates to increase participation at higher certification levels.

Outcome 2. Despite increased participation in CY 2025 compared to CY 2024, NTG decreased because a larger share of homes were built at lower certification levels. The CY 2019 billing analysis found that NTG varied across certification tiers, with homes in higher tiers having higher NTG ratios than those in lower tiers. By applying the CY 2019 tiered NTG ratios to CY 2025 program homes, the team calculated an overall electric NTG ratio of 7%, a decrease from 10% in CY 2024. The natural gas NTG ratio of 22%, with market effects, has remained stable since CY 2024.

6. Trade Ally Solutions Program

Through the Trade Ally Solutions Program, certified trade allies encourage residential customers to make energy-saving home improvements by conducting home energy assessments and providing recommendations for energy-efficient equipment and upgrades that qualify for Focus on Energy incentives. Trade allies become certified by completing an application form and agreeing to abide by the Trade Ally Code of Conduct. To maintain their certification status, each trade ally must complete at least one project and meet with a Focus on Energy representative for program updates and/or training at least once per calendar year.

In CY2025, the program provided rebates to single-family and multifamily customers who made efficiency upgrades through four statewide offerings:

- The **Heating and Cooling offering** provided rebates for ground-source heat pumps and variable-speed ECM pumps. CY 2025 was the first full year that common residential heating and cooling equipment were excluded from this offering; Focus on Energy moved measures such as furnaces, boilers, and air-source heat pumps to the Instant Discount Program in CY 2024.
- The **Insulation and Air Sealing offering** provided rebates for contractor-assisted or do-it-yourself residential insulation and air sealing improvements. Higher incentives were available to eligible income-qualified customers.
- The **Retail Smart Thermostats offering** provided rebates for qualifying smart thermostats purchased through any retailer.
- The **Tribal offering** engaged with tribal communities and provided higher rebates for the completion of weatherization, HVAC, and renewable energy projects.

APTIM administered the Trade Ally Solutions Program in CY 2025 with support from CLEAResult, the implementer, who conducted the day-to-day operations. Additional details about each Trade Ally Solutions offering are provided in the *Process Evaluation* section of this chapter.

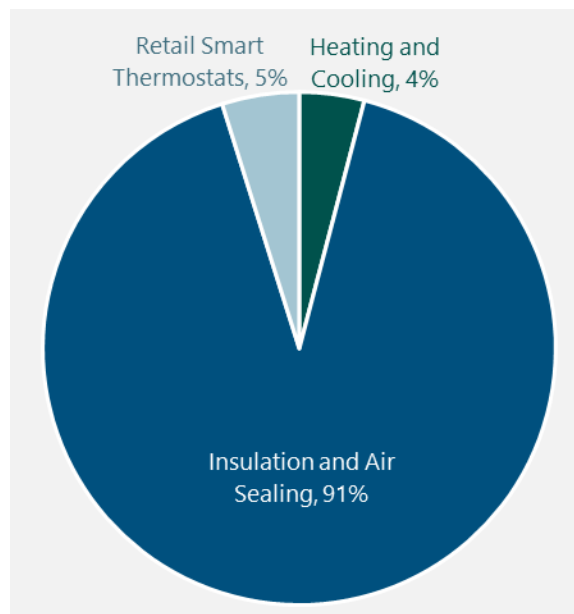
Table 49 presents the CY 2025 impacts for the Trade Ally Solutions Program, including impacts for statewide and tribal offerings.

Table 49. CY 2025 Trade Ally Solutions Summary

Item	Units	CY 2025
Rebate Spending	\$	\$3,545,694
Participation	Number of Participants	5,053
Verified Gross Lifecycle Savings	kWh	74,492,946
	kW Summer	2,849
	kW Winter	90
	therms	10,394,075
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%
Annual NTG Ratio	% (MMBtu)	83%
Net Annual Savings	kWh	3,006,914
	kW Summer	2,512
	kW Winter	63
	therms	385,251
Net Lifecycle Savings	MMBtu	1,105,244
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	1.44

Figure 33 shows the percentage of savings for Trade Ally Solutions by offering. In 2025, the Insulation and Air Sealing offering contributed 91% of gross lifecycle MMBtu savings to the program. This is a reversal from 2024, when the Insulation and Air Sealing offering contributed 19% of savings, while the Heating and Cooling offering was the most significant driver of savings (81% of total program savings). This shift is due to many Heating and Cooling measures moving into the Instant Discount Program in CY 2024. Measures installed through the Tribal offering were limited to heating and cooling measures in CY 2025 and are included in Figure 33; there were no reported Tribal insulation measures.

Figure 33. CY 2025 Trade Ally Solutions Gross Lifecycle Savings by Offering

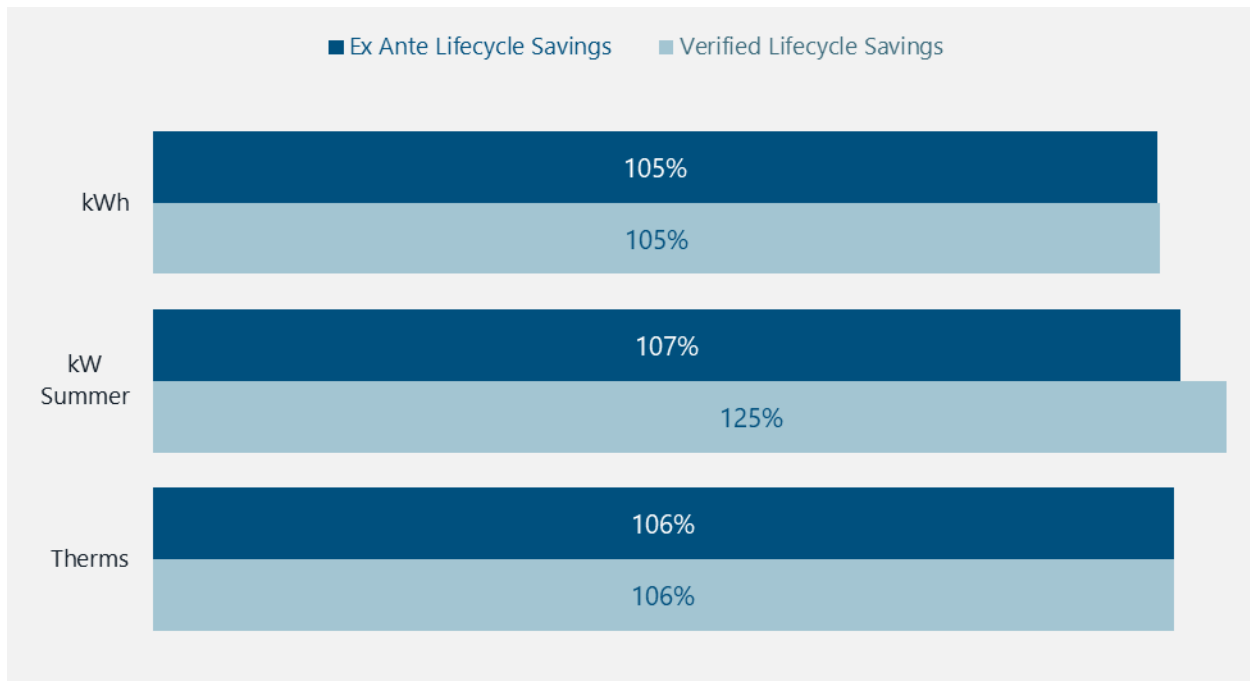


Note: Savings from the Tribal offering are rolled into the Heating and Cooling offering.

6.1. Achievement Against Goals

Figure 34 shows the percentage of gross lifecycle savings goals achieved by the Trade Ally Solutions Program in CY 2025. Overall, the program exceeded savings goals for kW Summer, kWh, and therms.

Figure 34. CY 2025 Trade Ally Solutions Achievement of Gross Lifecycle Savings Goals



100% *ex ante* gross lifecycle savings reflect the implementer’s contract goals for CY 2025. Verified gross lifecycle savings contribute to the administrator’s portfolio-level goals. Winter kW goals were not established for CY 2025

6.2. Impact Evaluation

This section contains the findings from the CY 2025 impact evaluation of the Trade Ally Solutions Program, followed by a discussion of results for each offering.

6.2.1. Impact Evaluation Methodology

The evaluation team conducted an impact evaluation of the CY 2025 Trade Ally Solutions Program using a combination of primary and secondary data. Table 50 lists specific impact evaluation activities completed for the CY 2025 evaluation. Additional details about these activities and their findings can be found in the offering-specific discussions below.

Table 50. CY 2025 Trade Ally Solutions Impact Evaluation Activities and Sample Sizes

Activity	Heating and Cooling	Insulation and Air Sealing	Tribal
Tracking Database Review	Census	Census	Census

6.2.2. Verified Gross Savings Results for Trade Ally Solutions

Table 51 lists the first-year and lifecycle realization rates for CY 2025 by offering, and Table 52 lists verified first-year and verified lifecycle savings. Overall, Trade Ally Solutions achieved a first-year evaluated realization rate of 100%, weighted by total (MMBtu) energy savings. Detailed findings for each offering, including factors affecting the realization rates, are provided in the following sections.

Table 51. CY 2025 Trade Ally Solutions First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Heating and Cooling	102%	214%	117%	100%	101%	102%	100%	101%
Insulation and Air Sealing, Standard	100%	104%	112%	100%	100%	100%	100%	100%
Insulation and Air Sealing, Income Qualified	100%	105%	100%	100%	100%	100%	100%	100%
Insulation and Air Sealing, Total	100%	105%	109%	100%	100%	100%	100%	100%
Retail Smart Thermostats	100%	N/A	N/A	100%	100%	100%	100%	100%
Tribal	100%	N/A	200%	100%	100%	100%	100%	100%
Total Trade Ally Solutions	100%	117%	113%	100%	100%	100%	99%	99%

Table 52. CY 2025 Trade Ally Solutions First-Year and Total Lifecycle Verified Gross Savings

Offering	Verified First-Year Savings					Verified Lifecycle Savings		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Heating and Cooling	517,435	58	49	28,707	4,636	8,289,075	399,665	68,249
Insulation and Air Sealing, Standard	1,888,228	2,008	31	289,318	35,374	47,217,534	7,252,949	886,401
Insulation and Air Sealing, Income Qualified	456,402	483	9	87,902	10,347	11,418,901	2,220,070	260,968
Insulation and Air Sealing, Total	2,344,630	2,491	40	377,220	45,722	58,636,435	9,473,019	1,147,369
Retail Smart Thermostats	840,126	0	0	55,584	8,425	7,561,134	500,256	75,824
Tribal	274	0	0.095	849	86	6,302	21,135	2,135
Total Trade Ally Solutions	3,702,465	2,550	89	462,360	58,869	74,492,946	10,394,075	1,293,577

Heating and Cooling: Verified Gross Savings Results

For the CY 2025 Heating and Cooling offering, the evaluation team conducted a database review and a TRM review to inform verified gross savings. The offering had a gross lifecycle MMBtu realization rate of 101%. The summer and winter peak-demand (kW) realization rates were higher at 214% and 117%, respectively. The high realization rate for summer and winter kW was driven by a discrepancy in the 2025 TRM and a midyear work paper for smart thermostats. See the Smart Thermostat section below for details.

Table 53 lists the CY 2025 *ex ante* and verified gross first-year and lifecycle savings for the Heating and Cooling offering. See Appendix E. Detailed Findings in Volume III for savings details by measure.

Table 53. CY 2025 Heating and Cooling Ex Ante and Verified Gross Savings

Savings Type	Ex Ante Gross					Verified Gross				
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	kW Summer	kW Winter	therms	MMBtu
First-Year Gross Savings	506,811	61	42	28,695	4,599	517,435	131	49	28,707	4,636
Lifecycle Gross Savings	8,129,911	61	42	399,517	67,691	8,289,075	131	49	399,665	68,249

Smart Thermostats

Smart thermostat measures appear under both the Heating and Cooling offering and the Retail Smart Thermostats offering. Some of the thermostats in the Heating and Cooling offering were under a legacy smart thermostat MMID. For this measure, the evaluation team applied CY 2022 smart thermostat billing analysis results, which are the basis of smart thermostat savings for the consolidated smart thermostat measures in the 2025 TRM. *Ex ante* applied deemed savings from the 2023 TRM, which did not reflect the CY 2022 smart thermostat billing analysis. This smart thermostat MMID had measure-level realization rates above 100% and an overall MMBtu realization rate of 110%, due to discrepancies between the two savings sources.

The other smart thermostat MMID under this offering was found in the 2025 TRM (MMID 10052). Verified savings for this MMID were based on a 2025 midyear work paper that added peak summer and winter kW demand for smart thermostat measures; however, *ex ante* savings were based on the 2025 TRM, which did not include demand savings. This discrepancy drove the offering's higher realization rates for summer and winter peak demand savings.

Air-Source Heat Pumps

Air-source heat pumps were moved to the Instant Discount Program starting in CY 2025. There was still one air-source heat pump installation that was processed through the Trade Ally Solutions Heating and Cooling offering. This project provided a verifiable AHRI equipment number, so the evaluation team applied deemed savings from the 2025 TRM, resulting in a realization rate of 100%.

Ground-Source Heat Pumps

Ground-source heat pumps remained in the Trade Ally Solutions Heating and Cooling offering in CY 2025, although there was a 43% decrease in participation from CY 2024, as shown in Table 54.

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Seven of the 63 CY 2025 ground-source heat pump projects were completed in late 2024 and had their payments fully approved in early January 2025. *Ex ante* calculations relied on deemed savings in the 2024 TRM, and verified savings applied deemed savings in the 2025 TRM. While the 2024 and 2025 TRMs have consistent kWh and therm savings, the 2025 TRM reports lower peak-demand savings, resulting in peak-demand realization rates of less than 100% for these measures.

Table 54. Year-Over-Year Ground-Source Heat Pump Participation

Technology, Service Type	Ex Ante Program Participation Quantity		
	2023	2024	2025
Ground-Source Heat Pump, With Gas Service	17	23	9
Ground-Source Heat Pump, No Gas Service	79	88	54
Total	96	111	63

Insulation and Air Sealing: Verified Gross Savings Results

For the Insulation and Air Sealing offering, the team conducted a database review and consulted the 2025 TRM to inform verified gross savings. The offering had a gross lifecycle MMBtu realization rate of 100%.

Table 55 lists the CY 2025 *ex ante* and verified gross first-year and lifecycle savings for the Insulation and Air Sealing offering. Savings by measure can be found in Appendix E. Detailed Findings in Volume III.

Table 55. CY 2025 Insulation and Air Sealing Ex Ante and Verified Gross Savings

Savings Type	Ex Ante Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
Insulation and Air Sealing, Standard								
First-Year Gross Savings	1,888,229	1,923	28	289,320	1,888,228	2,008	31	289,318
Lifecycle Gross Savings	47,217,233	1,923	28	7,252,902	47,217,534	2,008	31	7,252,949
Insulation and Air Sealing, Income Qualified								
First-Year Gross Savings	456,403	460	9	87,903	456,402	483	9	87,902
Lifecycle Gross Savings	11,418,291	460	9	2,219,891	11,418,901	483	9	2,220,070
Insulation and Air Sealing, Total								
First-Year Gross Savings	2,344,632	2,384	37	377,223	2,344,630	2,491	40	377,220
Lifecycle Gross Savings	58,635,524	2,384	37	9,472,793	58,636,435	2,491	40	9,473,019

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Some standard-income projects were completed in CY 2024 but processed and approved in CY 2025. Ex ante savings for these projects used deemed savings from the 2024 TRM, while verified savings applied values from the 2025 TRM. Additionally, some MMIDs don't follow the TRM due to a confirmed adjustment process for certain project completion applications. After confirming these applications were correctly claiming savings, the evaluation team weighted savings for those MMIDs to reflect these projects.

Retail Smart Thermostats: Verified Gross Savings Results

For the CY 2025 Retail Smart Thermostats offering, the evaluation team conducted a database review and a TRM review to inform verified gross savings. The offering had a gross lifecycle MMBtu realization rate of 100%.

Table 56 lists the CY 2025 *ex ante* and verified gross first-year and lifecycle savings for the Retail Smart Thermostats offering. Appendix E. Detailed Findings in Volume III details savings by measure.

All retail smart thermostat MMIDs were in the 2025 TRM, which included deemed kWh and therm savings. A midyear work paper added summer and winter peak demand savings for the measure. The *ex ante* savings were based on the 2025 TRM and claimed no peak demand savings; however, verified savings applied demand savings from the midyear work paper.

Table 56. CY 2025 Retail Smart Thermostats Ex Ante and Verified Gross Savings

Savings Type	Ex Ante Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	840,126	0	0	55,584	840,126	227	1	55,584
Lifecycle Gross Savings	7,561,134	0	0	500,256	7,561,134	227	1	500,256

Tribal: Verified Gross Savings Results

Savings and participation in the Tribal offering were down significantly in CY 2025 compared to previous years, as shown in Table 57.

Table 57. Year-Over-Year Tribal Offerings Participation and Savings

Metric	CY 2023	CY 2024	CY 2025
Participants	126	39	3
Units	117	132	7
Verified First-Year Gross Savings (MMBtu)	865	1,074	86

The seven Tribal projects processed in CY 2025 were all income-qualified. The evaluation team conducted a database review and consulted the 2025 TRM to inform verified gross savings for these measures. Table 58 shows the *ex ante* and verified savings for Tribal offering measures. The offering had a gross lifecycle MMBtu realization rate of 100%.

Table 58. CY 2025 Tribal Ex Ante and Verified Gross Savings

Savings Type	Ex Ante Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	274	0	0.05	849	274	0	0.10	849
Lifecycle Gross Savings	6,311	0	0.05	21,131	6,302	0	0.10	21,135

A multistage furnace measure (MMID 4972) correctly claimed kWh and therm savings based on the 2025 TRM for the two units installed; however, it only claimed winter kW savings for one of the projects. Because this was the only measure with winter kW savings in the Tribal offering, this discrepancy resulted in a winter kW realization rate of 200% for the offering.

6.2.3. Verified Net Savings Results for Trade Ally Solutions

The evaluation team used a variety of NTG analyses to calculate measure-level NTG ratios for offerings in the Trade Ally Solutions Program. The team selected the NTG approach based on the project type and the data available for measures in the offering, as shown in Table 59. The team’s analyses are further detailed in the following sections.

Table 59. CY 2025 Trade Ally Solutions NTG Approaches

Offering	NTG Approach
Heating and Cooling	Self-report responses from CY 2023 participant surveys
Insulation and Air Sealing	CY 2024 billing analysis
Retail Smart Thermostats	Self-report responses from CY 2025 participant surveys
Tribal, Income Qualified	Assumed 100%

Table 60 shows the weighted average NTG ratio by offering, as well as the total first-year verified gross and net savings. The evaluation team calculated an overall lifecycle NTG estimate of 83% for CY 2025.

Table 60. CY 2025 Trade Ally Solutions First-Year Net Savings and NTG

Offering	Total First-Year Verified Gross Savings (MMBtu)	Total First-Year Net Savings (MMBtu)	NTG Ratio
Heating and Cooling	4,636	3,230	70%
Retail Smart Thermostats	8,425	5,139	61%
Insulation and Air Sealing, Standard	35,374	32,309	91%
Insulation and Air Sealing, Income Qualified	10,347	8,021	78%
Insulation and Air Sealing, Total	45,722	40,330	88%
Tribal	86	86	100%
Total Trade Ally Solutions	58,869	48,785	83%

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Heating and Cooling Offering, Standard

To calculate net savings for measures in the CY 2025 Heating and Cooling offering, the evaluation team applied NTG results from the CY 2023 participant survey. The CY 2025 offering included some measures that were not surveyed in CY 2023. For these measures, the team applied the NTG estimate of the most appropriate similar measure.

Table 61 shows the NTG ratios and CY 2023 survey measure sources for all measures in the CY 2025 Heating and Cooling offering.

Table 61. CY 2025 Heating and Cooling NTG Ratios

Measure Group	Measure Source from CY 2023 Participant Survey	NTG
Air Conditioner Tune-Up	Applied Furnace NTG	53%
Air-Source Heat Pump	Air-Source Heat Pump	73%
Boiler Tune-Up	Boiler	54%
ECM Furnace Fan	Applied Furnace NTG	53%
ECM Pumps	Applied Furnace NTG	53%
Furnace Tune-Up	Furnace	53%
Ground-Source Heat Pump	Ground-Source Heat Pump	68%
Non-Retail Smart Thermostat	Smart Thermostat	72%
Water Heater	Water Heater	54%

Insulation and Air Sealing

In CY 2024, the evaluation team conducted a billing analysis of whole-home completion projects in the Insulation and Air Sealing offering to assess verified net savings. These completion projects included insulation and air sealing work that could be performed in various areas of a home, such as the attic, walls, foundation, and ductwork. Although the improvements can be completed in any combination, they are treated as a single measure with combined energy savings. Because these improvements impact the whole home, savings are often realized across all energy sources (electricity and fuel). Electric energy savings result from reduced electric heating or cooling demand, less frequent system cycling, and reduced fan or blower run times. Natural gas savings result from reduced demand for natural gas heating.

Table 62 shows the NTG ratios applied to the Insulation and Air Sealing offering's standard measures in CY 2025 based on the CY 2024 billing analysis.

Table 62. CY 2025 Project Completion Measures

Tracks	Project Completion Measures	kWh NTG	kW NTG	Therms NTG
Standard Income	Natural Gas Heat	92%	92%	92%
	Natural Gas Heat Only	0%	0%	92%
	Do-it-Yourself (DIY) Installation Gas Heat	49%	49%	83%
	Electric Heat	76%	76%	0%
Income-Qualified	Natural Gas Heat	96%	96%	77%
	DIY Installation Gas Heat	49%	49%	83%
	Electric Heat	76%	76%	0%

Retail Smart Thermostats Offering

For the CY 2025 Retail Smart Thermostats evaluation, the team used participant surveys to assess net savings. Survey questions for self-reported NTG values allowed the evaluation team to calculate measure-level freeridership (measures that would have been purchased without the offering’s influence) and spillover (offering-induced energy-saving actions).

To calculate the measures’ final NTG ratios, the evaluation team combined self-reported freeridership and spillover results using the following equation. A complete summary of the team’s self-report NTG analysis and findings can be found in Appendix H. Net Savings analysis in Volume III.

$$NTG = 1 - Freeridership + Participant Spillover$$

Table 63 shows the NTG ratios applied to the Retail Smart Thermostats offering measures in CY 2025.

Table 63. CY 2025 Retail Smart Thermostats NTG Ratios

Measure Group	NTG Source	Freeridership	Spillover	NTG (1 – Freeridership + Spillover)
Retail Smart Thermostat	CY 2025 participant survey	39%	0%	61%

6.3. Process Evaluation

The CY 2025 process evaluation focused on the Retail Smart Thermostats offering participants' experiences and satisfaction across the offering.

6.3.1. Process Evaluation Methodology

Table 64 lists the data collection activities and sample sizes for the Trade Ally Solutions Program process evaluation, followed by a description of these activities and the related findings.

Table 64. CY 2025 Trade Ally Solutions Process Evaluation Activities and Sample Sizes

Activity	Heating and Cooling	Insulation and Air Sealing	Retail Smart Thermostats	Tribal	Total
Implementation Plan Review	✓	✓	N/A	✓	N/A
Participant Surveys	0	0	81	0	81
Customer Satisfaction Surveys, Trade Ally Solutions ^a	0	0	0	0	233
Customer Satisfaction Surveys, Retail Thermostats	0	0	124	0	124

^a Trade Ally Solutions customer satisfaction surveys are for all offerings except Retail Smart Thermostats; responses do not indicate the specific offering in which the customers participated.

Implementation Plan Review

The evaluation team reviewed the implementation plan for the Trade Ally Solutions Program to understand how the program operated in CY 2025. The implementer developed the plan to document programmatic details, such as eligible measures, targeted participants, and delivery channels.

Participant Surveys

During October 2025, the evaluation team surveyed a random sample of participants who received rebates for retail smart thermostats between January 1 and August 31, 2025. Survey topics included awareness of Focus on Energy programs, decision-making processes, satisfaction with the program, and customer demographics.

The evaluation team created a sample of 1,008 participants from the population of 1,021 retail smart thermostat participants with email addresses and sent links to the online survey via email. Of the 1,008 participants included in the sample frame, 81 responded to the survey, for a response rate of 8%.

Ongoing Customer Satisfaction Surveys

Throughout CY 2025, the administrator emailed Trade Ally Solutions Program participants links to the web-based satisfaction surveys. There were two objectives for these satisfaction surveys:

- Understand customer satisfaction on an ongoing basis and respond to any changes in satisfaction before the end of the annual reporting schedule
- Help to facilitate timely follow-up with customers to clarify and address service concerns

Using contact information stored in SPECTRUM, the administrator ran web-based satisfaction surveys throughout the year for CY 2025 participants. The survey covered several topics, including overall

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satisfaction, satisfaction with program staff and trade allies, and the likelihood of recommending Focus on Energy.

6.3.2. Design and Delivery

The Trade Ally Solutions Program provides rebates to owners of one- to three-unit homes through four offerings: Heating and Cooling, Insulation and Air Sealing, Retail Smart Thermostats, and Tribal. Multifamily dwellings with four or more units under a single roof were also eligible if the heating or cooling equipment was for a single unit. The following sections describe the design and delivery of these offerings in CY 2025.

Heating and Cooling Offering

The Heating and Cooling offering provided rebates for upgrading certain heating and/or cooling equipment. Customers worked with trade allies to identify and install eligible equipment and apply for a rebate. The Heating and Cooling offering provided a single tier of rebates in CY 2025.

Table 65 shows eligible equipment and rebates available through the offering in CY 2025.

Table 65. CY 2025 Heating and Cooling Measures and Rebates

Measure	Rebate Amount
Smart Thermostat	
ENERGY STAR Smart Thermostat	\$50
Geothermal Heat Pump (including dual-fuel heat pump)	
Certified Geothermal Heat Pump (with natural gas service)	\$1,000
Certified Geothermal Heat Pump (with no natural gas service)	\$750
ECM Variable-Speed Pump	
ECM Motor	\$25
ECM Variable-Speed Pump < 100W	\$50
ECM Variable-Speed Pump 100-500W	\$160
ECM Variable-Speed Pump > 500W	\$320
Multifamily Style Equipment	
Single Package Vertical Unit (natural gas unit, 90%+ thermal efficiency)	\$100
Single Package Vertical Unit (natural gas unit, 90%+ thermal efficiency, 11.0+ Energy Efficiency Ratio)	\$150
Packaged Terminal Heat Pump	\$90

Insulation and Air Sealing Offering

In CY 2025, the Insulation and Air Sealing offering provided rebates for installing efficient building shell measures through two participation paths:

- **Trade Ally Installed.** On this path, customers hired a Focus on Energy registered trade ally (contractor) to conduct a home energy assessment and identify areas for improvement. Following the energy assessment, customers selected which insulation and air sealing improvements to make and worked with their contractor to complete the project and apply for rebates. Customers could forgo the assessment and air-sealing rebate and still receive a rebate for having insulation

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installed by a registered trade ally. However, customers who wished to receive a rebate for completing ENERGY STAR–qualified air sealing also had to complete an energy assessment.

- **Do-It-Yourself (DIY).** On this path, customers could self-install attic insulation and air sealing to receive a \$200 cashback rebate. Customers had to install attic insulation and air sealing according to Focus on Energy’s *DIY Guide to Insulation and Air Sealing* and improve at least 600 square feet of attic to an insulation level of R-42 or greater to receive the rebate. The implementer verified the installation through photos provided by the homeowner.

The Insulation and Air Sealing offering provided two rebate tiers: standard and income-qualified. Customers were eligible for income-qualified rebates if their household income was at or below 80% of the state median income by household size. Qualifying customers in single-family homes or who own multifamily buildings with three or fewer units under one roof were eligible for a flat rebate for each measure. Table 66 shows measures and tiered rebates for eligible customers in CY 2025.

Table 66. CY 2025 Insulation and Air Sealing Measures and Rebates

Measure	Standard Rebate	Income-Qualified Rebate
ENERGY STAR-Qualified Air Sealing	\$675	\$1,125
Attic Insulation	\$525	\$675
Foundation Insulation ^a	\$75	\$110
Sill Box Insulation	\$75	\$110
Wall Insulation	\$450	\$450
Duct Sealing and Insulation	\$75	\$75
Verified Duct Sealing & Insulation	\$1,000	\$1,000
DIY Attic Insulation and Air Sealing	\$200	\$200

^a Foundation insulation must be completed along with attic insulation improvements installed by a trade ally.

Retail Smart Thermostats Offering

In CY 2025, the Retail Smart Thermostats offering provided rebates to customers who purchased smart thermostats through retail channels. Customers were responsible for completing the required application and submitting it, along with supporting documentation, to Focus on Energy. The Retail Smart Thermostats offering provided \$50 rebates to all customers.

Tribal Offering

In CY 2022, Focus on Energy designed the Tribal Nations Pilot to engage with Tribal communities and provide BPI training and higher rebates for completing weatherization, HVAC, and renewable energy projects. In CY 2023, Focus on Energy updated the Tribal Nations Pilot to be the Tribal offering. At the start of 2024, Focus on Energy and program implementer CLEAResult reduced the heat pump incentive from \$8,000 to \$4,000 per system.

The offering did not change in 2025 and will continue through the rest of the CY 2023-CY 2026 quadrennium.

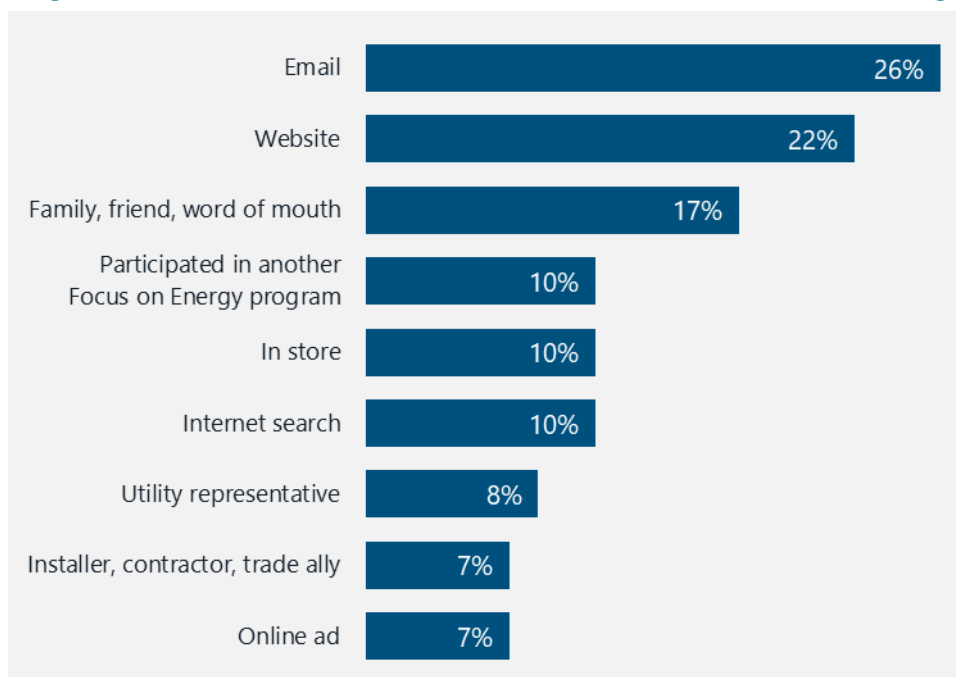
6.3.3. Retail Smart Thermostats Offering Customer Experience

In CY 2025, the evaluation team assessed customer experience with the Retail Smart Thermostats offering through a participant survey. This section presents the survey's results.

Participant Awareness

The survey included several questions to understand the most prominent sources of awareness of the Retail Smart Thermostats offering. Participants most frequently reported hearing about the program via email (26%), through a website (22%), and through family, a friend, or word of mouth (17%). Figure 35 shows a breakdown of all sources of program awareness. Of respondents who selected email, 65% (11 of 17) said the email came from Focus on Energy, while 35% said it came from their utility (six of 17).

Figure 35. Sources of Awareness of the Retail Smart Thermostats Offering

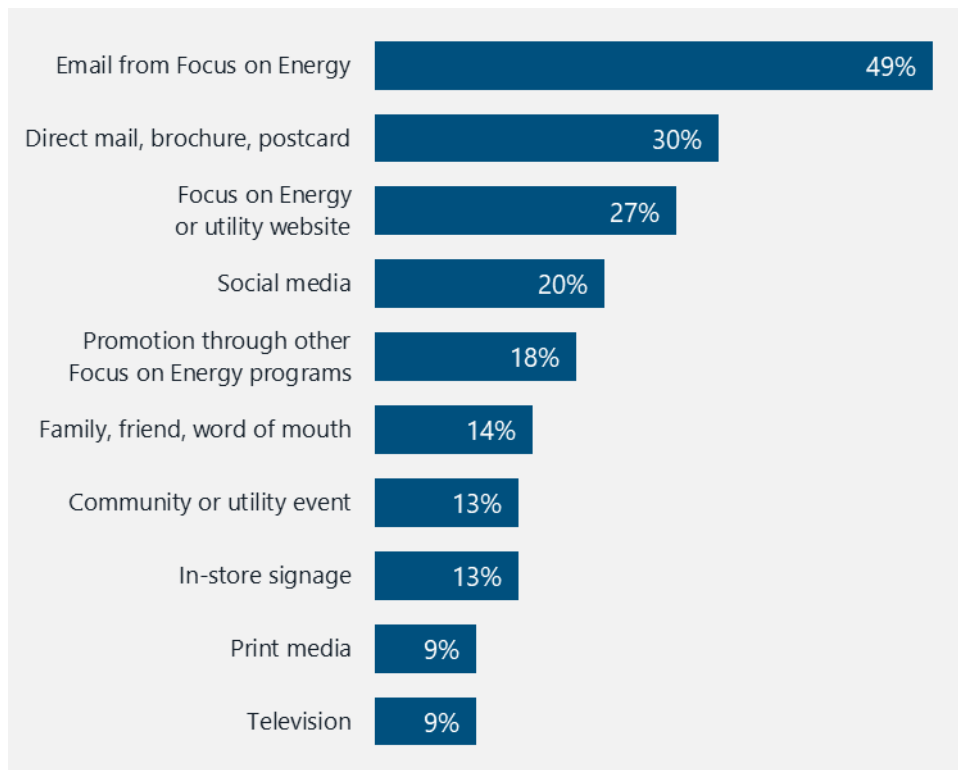


Source: CY 2025 Retail Smart Thermostat Participant Survey: "Where have you heard about Focus on Energy's rebates for thermostats? Select all that apply" (n=77) Multiple responses allowed.

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When asked about their preferred way to learn about Focus on Energy programs, 49% of survey respondents indicated that they would prefer receiving information via email, followed by 30% saying they would prefer receiving information via direct mail, 27% via the Focus on Energy or utility website, and 20% via social media. Figure 36 shows a full breakdown of participants' preferred outreach methods.

Figure 36. Preferred Outreach Methods

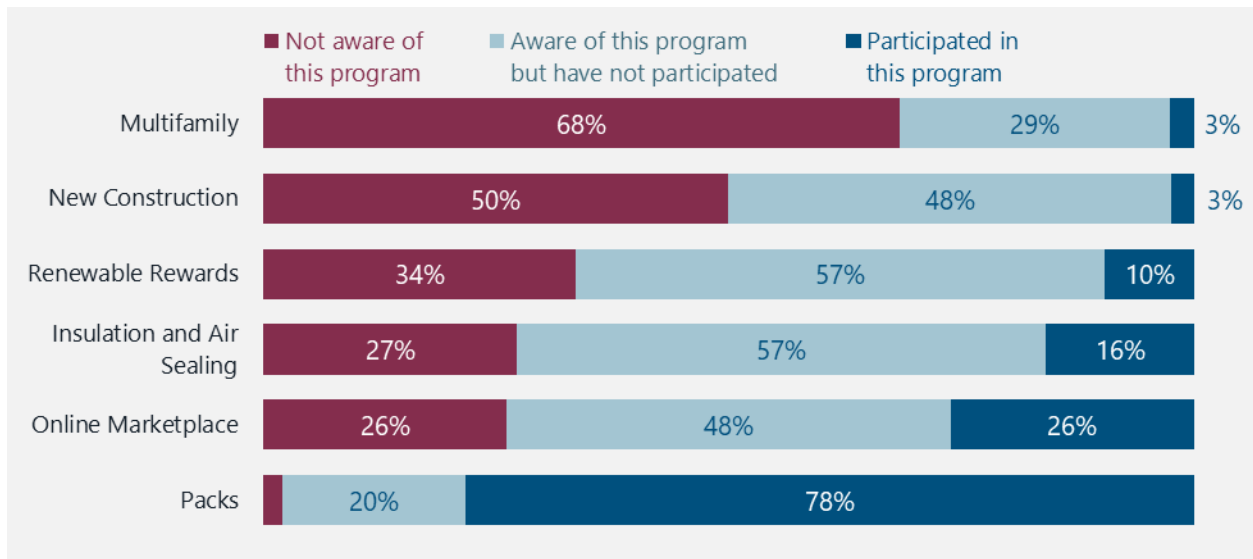


Source: CY 2025 Retail Smart Thermostat Participant Survey: "What are the best ways for Focus on Energy to inform people about programs that can help them save energy? Select all that apply." (n=78)

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Over half of the Retail Smart Thermostat survey respondents (64%) reported being aware of other Focus on Energy programs. As shown in Figure 37, Figure 38, and Figure 39, 78% of those who were aware of the other Focus on Energy programs had previously participated in the Energy Savings Packs offering, the highest participation out of any program offerings. This was followed by 26% of respondents who participated in the Online Marketplace offering.

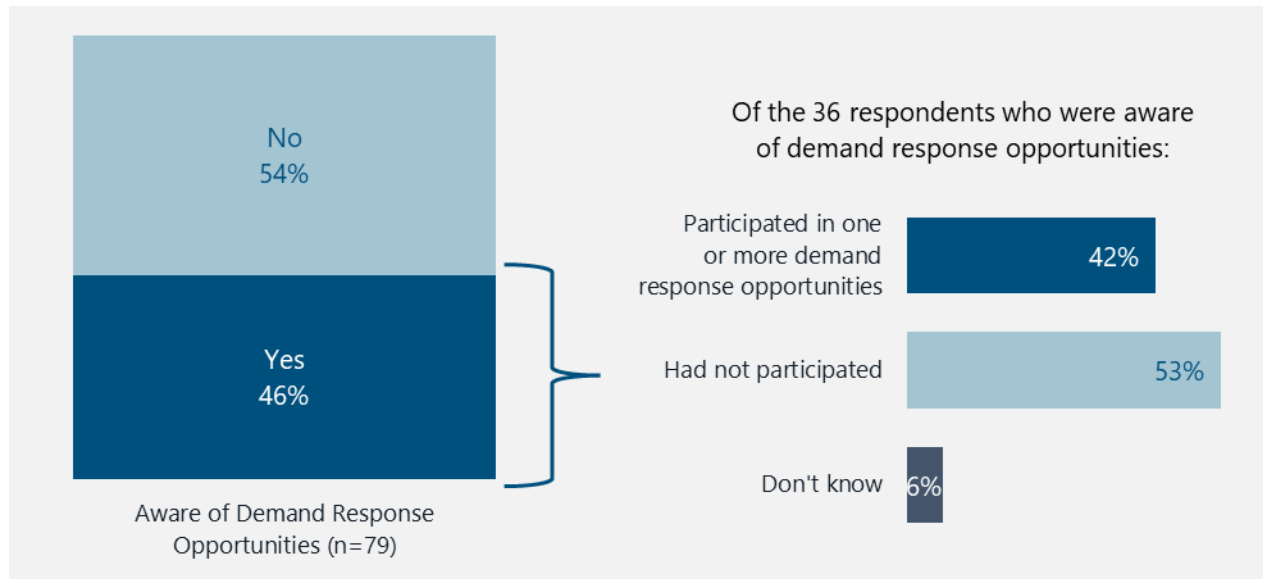
Figure 37. Awareness of and Participation in Other Focus on Energy Programs



Source: CY 2025 Retail Smart Thermostat Participant Survey: “For the Focus on Energy programs listed below, please indicate which ones you are aware of and which you have participated in.” (n=47)
Some values may total over 100% due to rounding.

When asked if they were aware of any demand response opportunities offered by their utility, such as time-of-use rates and bill credits for usage reduction, participants were evenly split, with 46% saying they were aware of these opportunities and 54% saying they were not (n=79, Figure 38). Of the 36 respondents who were aware of demand response opportunities, 42% had participated in one or more, while 53% had not, and 6% didn’t know.

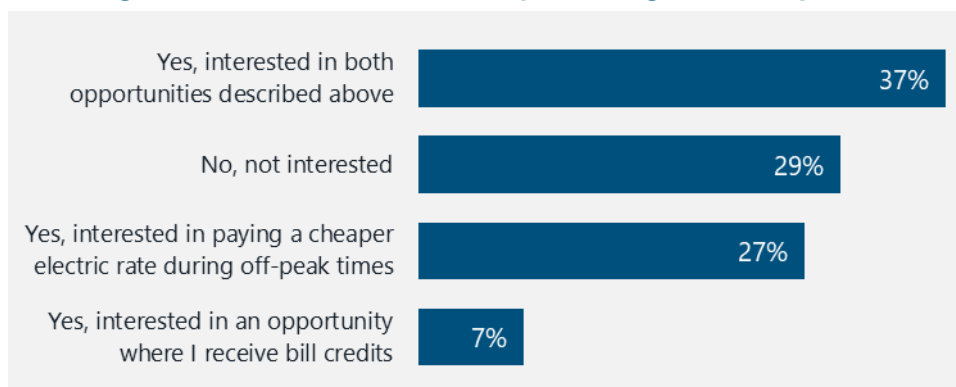
Figure 38. Awareness of and Participation in Demand Response Programs



Source: CY 2025 Retail Smart Thermostat Participant Survey: “Are you aware of any demand response opportunities that may be offered by your utility, such as variable “time of use” rates or bill credits if you agree to reduce your energy use on certain days or times (usually very hot or very cold days)?” (n=79) and “Have you participated in any of these opportunities?” (n=36)

The survey asked customers whether they would be interested in participating in either a demand response program that offers bill credits for load shifting or one that offers lower off-peak electricity rates. While 29% of respondents said they would not be interested in either program, over a third (37%) said they would be interested in both types of programs, and another quarter (27%) indicated that they would be interested in cheaper off-peak electric rates. Only 7% of respondents reported an interest in bill credits. Figure 39 shows a full breakdown of responses.

Figure 39. Interest in Demand Response Program Participation



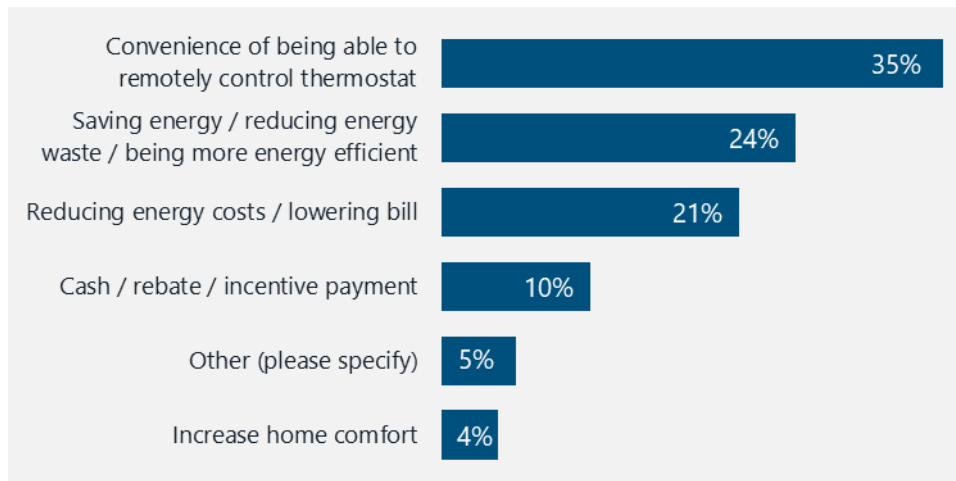
Source: CY 2025 Retail Smart Thermostat Participant Survey: “Would you be interested in an opportunity to save money on your electricity bill by shifting high-energy activities to off-peak times when energy demand is low? Off-peak times are typically early mornings, nights, weekends, and holidays. High-energy activities include electric space and water heating, electric vehicle (EV) charging, and drying clothes.” (n=41)

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Purchase and Energy-Use Motivation

The majority of respondents were motivated to purchase a thermostat by the convenience of remote operation (35%), followed by energy savings (24%) and reduced energy costs (21%). The only non-energy benefit that received more than a few responses was the convenience of remotely controlling the thermostat. Figure 40 shows a full breakdown of the top motivations. "Other" responses included ease of use, the utility of checking temperatures when away from home, compatibility with old thermostat wiring, and the fact that the old device is no longer supported.

Figure 40. Top Motivations for Purchasing a Smart Thermostat

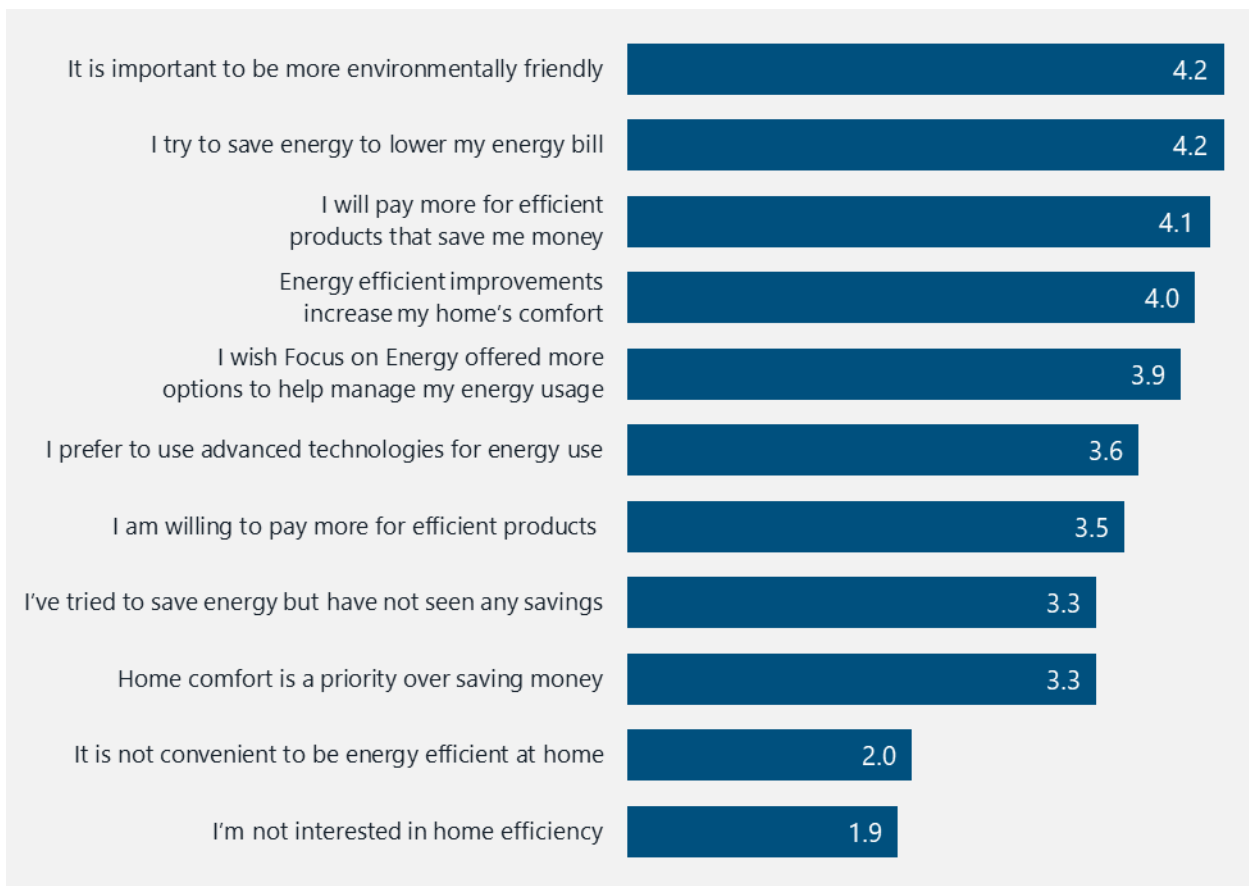


Source: CY 2025 Retail Smart Thermostat Participant Survey: "What factor was the most important motivation for you to purchase your thermostat?" (n=78)

The survey asked participants to rate their level of agreement with a set of statements about their energy-use habits and motivations on a scale of 1 to 5, where 1 meant *strongly disagree*, and 5 meant *strongly agree*.

Figure 41 shows the average level of agreement with each statement. The statements that received the highest average levels of agreement were "It is important to conserve resources to be more environmentally friendly" and "I try to save energy to lower my energy bill," (both 4.2 out of 5), while the statements with the lowest average levels of agreement were "It is not convenient to be energy efficient at home" (2.0 out of 5) and "I'm not interested in improving my home's efficiency" (1.9 out of 5).

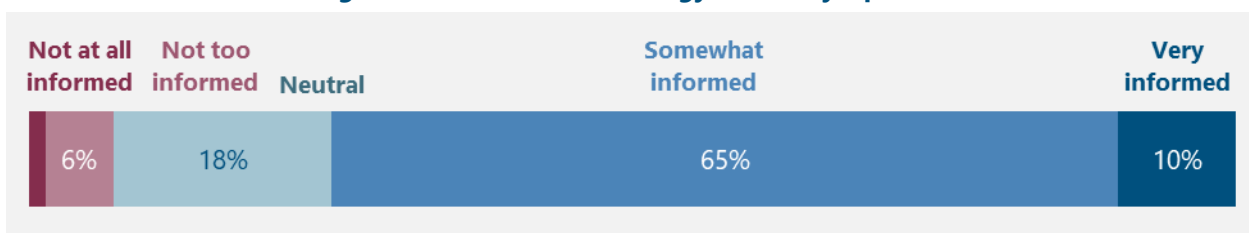
Figure 41. Energy Usage Motivation Statements



Source: CY 2025 Retail Smart Thermostat Participant Survey Energy Usage Motivation Statements (n=70)

When asked how informed they felt about ways to save energy, participants largely reported feeling *somewhat informed* (65%). Figure 42 shows the full breakdown of responses.

Figure 42. Awareness of Energy Efficiency Options

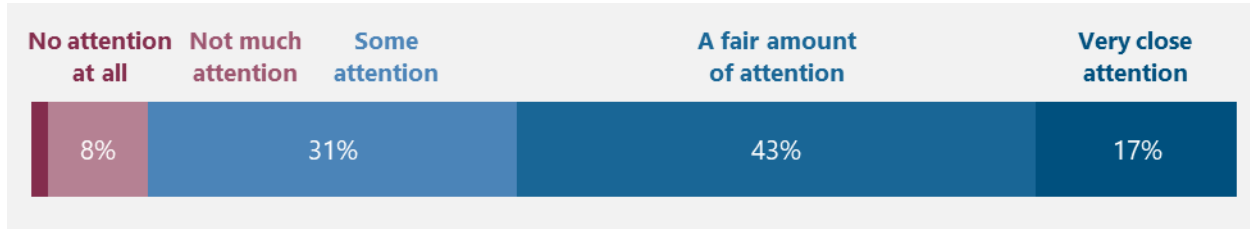


Source: CY 2025 Retail Smart Thermostat Participant Survey: "How informed do you feel about all the ways you can save energy, including buying and using energy-efficient appliances and equipment?" (n=72)

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When asked how much attention they pay to the energy they use at home, 60% of respondents reported paying a *very close* or *fair amount of attention*. Only 9% reported *not paying attention* to their energy usage. Figure 43 shows the full breakdown of responses.

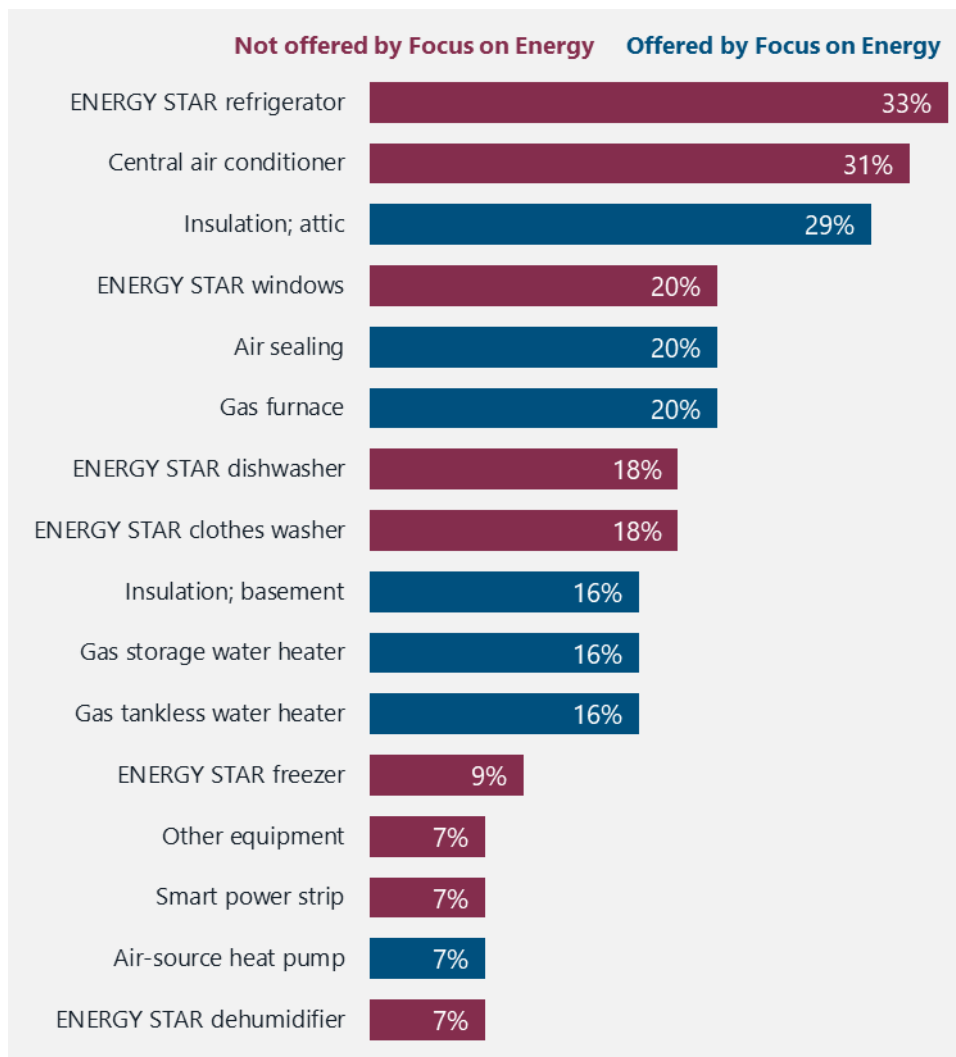
Figure 43. Attention Paid to Energy Usage



Source: CY 2025 Retail Smart Thermostat Participant Survey: “How much attention do you pay to the amount of energy (gas or electric) that you use in your home?” (n=72)

When asked what other energy efficiency improvements they plan on making in their homes within the next five to 10 years, the majority of respondents indicated that they plan on making one or more improvements to their home (63%); the remaining 37% of respondents said they did not know if they would make improvements. Among respondents who planned to make improvements, the most common project was installing an ENERGY STAR refrigerator (33%), followed by installing a central air conditioner (31%) and installing attic insulation (29%). Figure 44 shows the percentage of respondents who plan to make the listed upgrades within the next five to 10 years.

Figure 44. Upcoming Energy Efficiency Projects



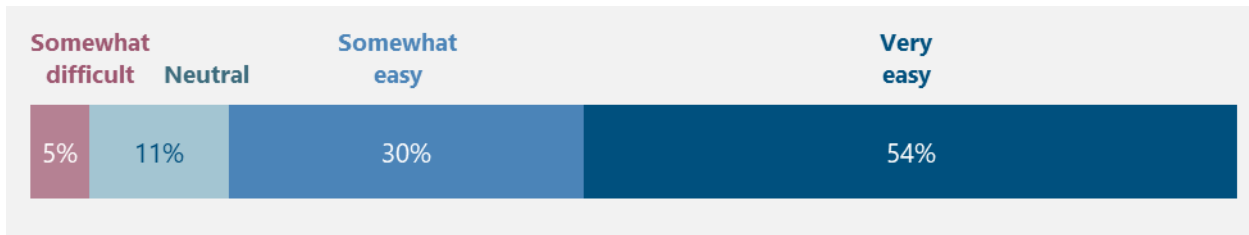
Source: CY 2025 Retail Smart Thermostat Participant Survey: “What other energy improvements do you plan to make to your home over the next 5 to 10 years? Select all that apply.” (n=45) Multiple responses allowed. Blue bars represent incentives already offered by Focus on Energy.

Installation and Application Experience

The survey asked participants about their experience installing the new thermostat. Most participants installed their thermostats themselves (77%, n=79), while others had a contractor install it (15%) or asked a friend or relative (8%).

Participants who installed the thermostat themselves said it was *somewhat easy* (30%) or *very easy* (54%) to install (Figure 45). Only 5% said it was *somewhat difficult*, and no one said it was *very difficult*. Two customers who said it was *somewhat difficult* to install reported issues with setting up an account and a lack of clarity about how many wires were required.

Figure 45. Ease of Installing the Smart Thermostat



Source: CY 2025 Retail Smart Thermostat Participant Survey: “Overall, how would you rate the ease of installing your thermostat?” (n=61)

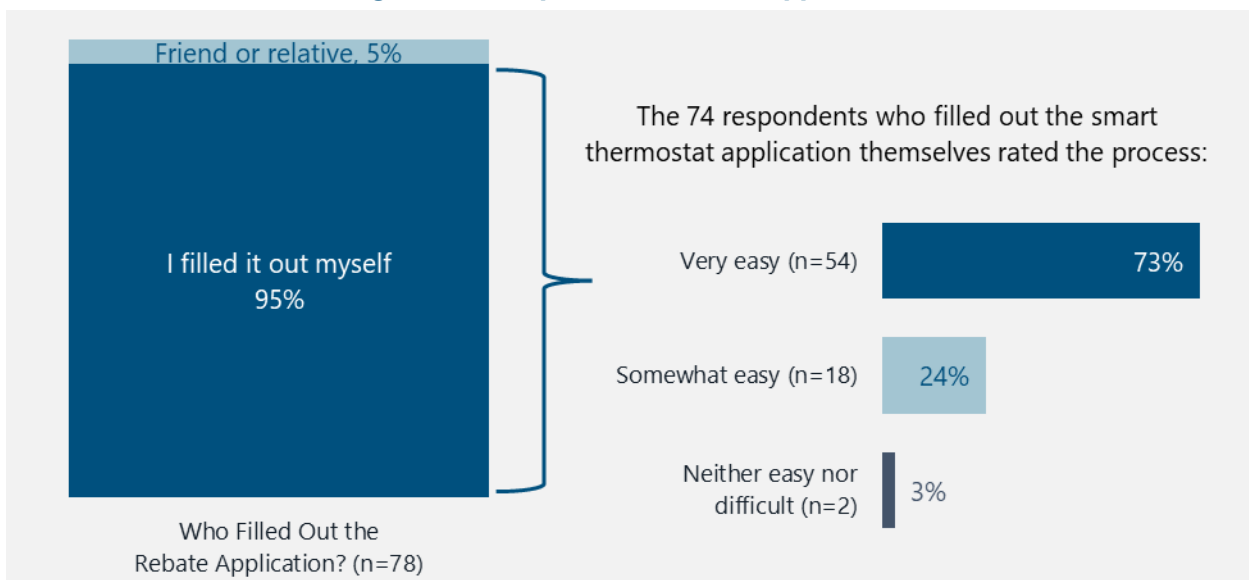
Among the 12 customers who had a contractor install their thermostat, eight had worked with the contractor previously. When asked how they found their contractor, the other four provided a mix of responses:

- Two got a referral from a friend or relative
- One found their contractor via social media
- One hired a contractor based on personal research

When asked about their satisfaction with the contractor who installed their thermostat, most customers (10 of 12) said they were *very satisfied*, while the remaining two were *somewhat satisfied* (17%).

When asked who filled out the application to receive the rebate for their smart thermostat, almost all customers (95%, n=78) responded that they filled it out themselves (Figure 46). The remaining customers had a friend or relative fill it out. Of those who filled out the application themselves, almost all found it *somewhat easy* (24%, n=18) or *very easy* (73%).

Figure 46. Completion of Rebate Application



Source: CY 2025 Retail Smart Thermostat Participant Survey: “Who filled out the application to receive your rebate for your thermostat?” (n=78) and “How would you rate the ease of filling out the application?” (n=74)

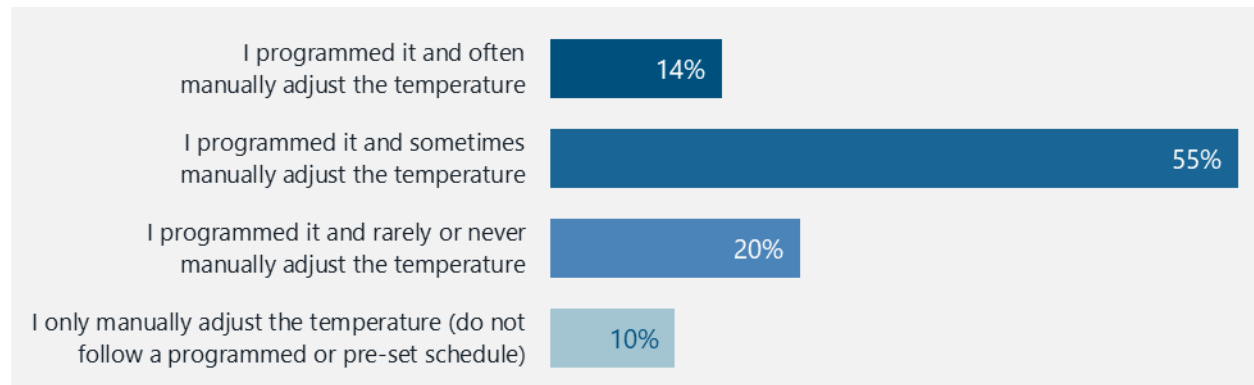
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Smart Thermostat Usage

Most respondents (92%, n=79) reported using their smart thermostats to control both heating and cooling equipment, while 8% used them to control heating equipment only, and 1% did not know what type of equipment they controlled. No customers reported using only their thermostat to control air conditioning equipment.

When asked how they use their smart thermostats, a slight majority of respondents (55%) reported that they programmed their thermostats and sometimes make manual adjustments (Figure 47). Twenty percent of respondents said they programmed their thermostats and rarely or never make manual adjustments, while 14% said they programmed their thermostats and often make manual adjustments. Ten percent of respondents did not program their thermostats at all. One respondent who selected “other” said that they adjust the thermostat only via their online account.

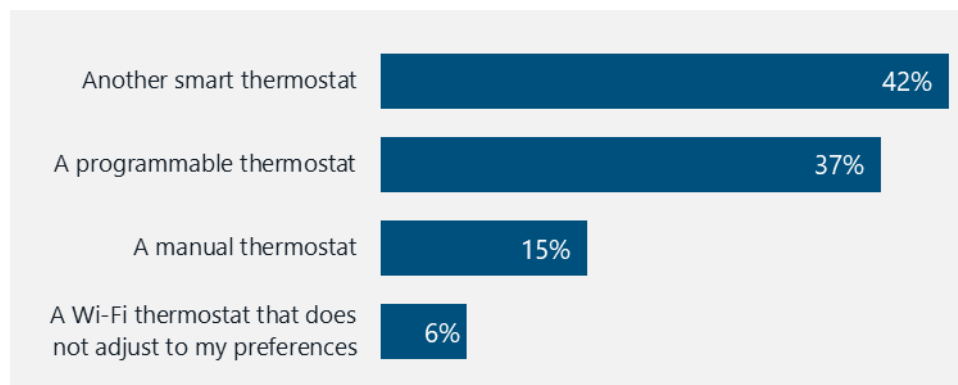
Figure 47. Smart Thermostat Usage



Source: CY 2025 Retail Smart Thermostat Participant Survey: “How do you use your thermostat?” (n=80)
Values total less than 100% due to rounding.

When asked what type of thermostat the smart thermostat replaced, most customers said that they replaced other types of smart or programmable thermostats (42% and 37%, respectively), while only 15% reported replacing a manual thermostat (Figure 48).

Figure 48. Equipment Replaced



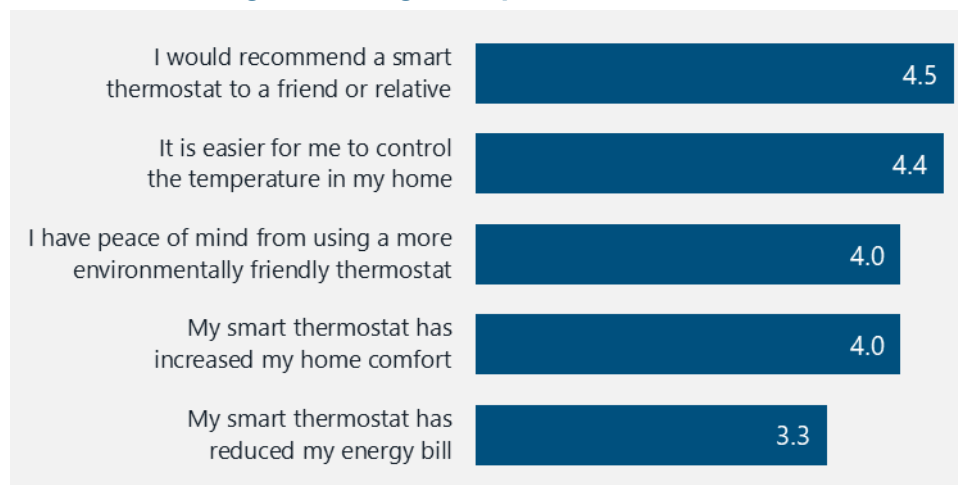
Source: CY 2025 Retail Smart Thermostat Participant Survey: “What type of thermostat did the new thermostat replace?” (n=79) Values total less than 100% due to rounding.

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The survey asked participants about their satisfaction with the learning process for using the thermostat and their experience with it once they knew how to use it. On a scale of 1 to 5, where 1 was *very dissatisfied* and 5 was *very satisfied*, participants gave an average satisfaction rating of 4.3 for the experience of learning to use the thermostat (n=77) and 4.4 for the experience once they had learned to use it (n=72).

Participants were also asked to rate their level of agreement with a set of statements about their thermostat on a scale of 1 to 5, where 1 was *strongly disagree* and 5 was *strongly agree*. (Figure 49). Participants expressed the highest levels of agreement with the statements “I would recommend a smart thermostat to a friend or relative” (4.5 out of 5) and “It is easier for me to control the temperature of my home” (4.4 out of 5). Participants expressed the lowest level of agreement with the statement “My smart thermostat has reduced my energy bill” (3.3 out of 5), with 42% of respondents reporting that they *neither agreed nor disagreed*.

Figure 49. Program Experience Statements



Source: CY 2025 Retail Smart Thermostat Participant Survey Experience Statements (n=78)

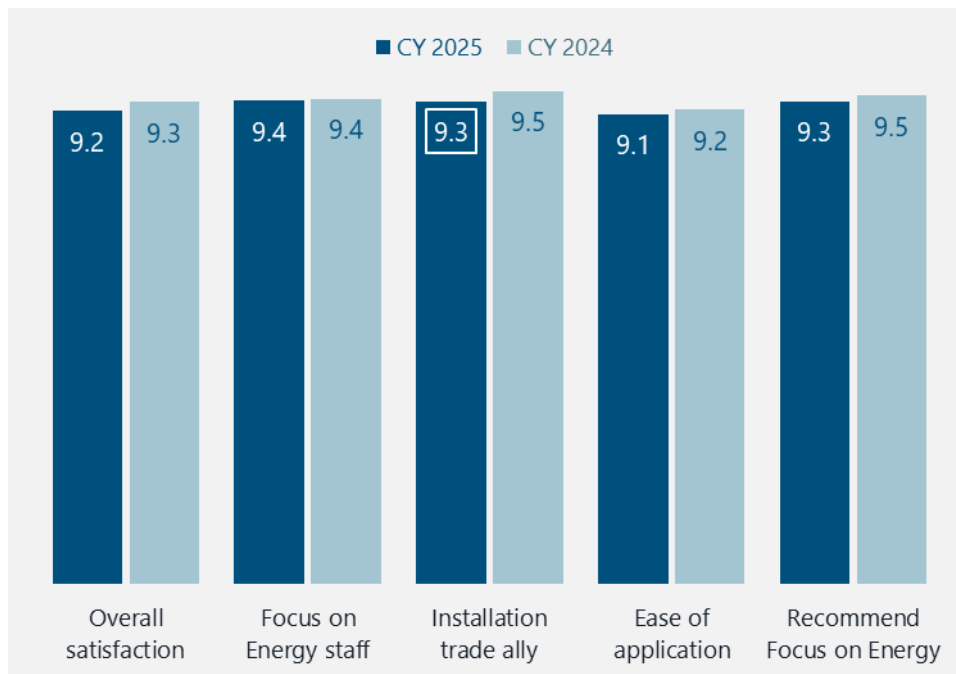
6.4. Customer Satisfaction Results for Trade Ally Solutions

Throughout CY 2025, the Trade Ally Solutions administrator invited participants in the Heating and Cooling, Insulation and Air Sealing, and Tribal offerings to take a web-based satisfaction survey (Trade Ally Solutions survey respondents). The administrator also surveyed customers in the Retail Smart Thermostats offering (Retail Smart Thermostat respondents). Respondents to both surveys answered questions related to satisfaction and the likelihood to recommend Focus on Energy on a scale of 0 to 10, where 10 indicated the highest degree of satisfaction or likelihood to recommend and 0 the lowest.¹⁶

¹⁶ The number of participants who completed a survey does not always match the number of responses for each question because some participants skipped or did not know the answers to questions.

As Figure 50 shows, Trade Ally Solutions survey respondents gave the offerings they participated in an average overall satisfaction rating of 9.2 in CY 2025, which was statistically equivalent to the average rating of 9.3 in CY 2024. From CY 2024 to CY 2025, participants gave high average satisfaction ratings across all aspects of the program. The lowest-rated aspect of the program was 9.1 for ease of filling out and submitting the application, which is still considered high satisfaction. The only satisfaction rating that differed significantly from the CY 2024 rating was the trade ally rating, which was 9.3 in CY 2025 and 9.5 in CY 2024 ($p < 0.10$). Any differences between CY 2024 and CY 2025 could be due to the shift in program offerings between the two years. In CY 2024, the largest share of participants was from the Heating and Cooling offering. In CY 2025, Insulation and Air Sealing participants were the most prevalent, and there was a significant decrease in Heating and Cooling participation due to Focus on Energy shifting most HVAC measures to the Instant Discount Program.

Figure 50. CY 2025 and CY 2024 Trade Ally Solutions Satisfaction Ratings



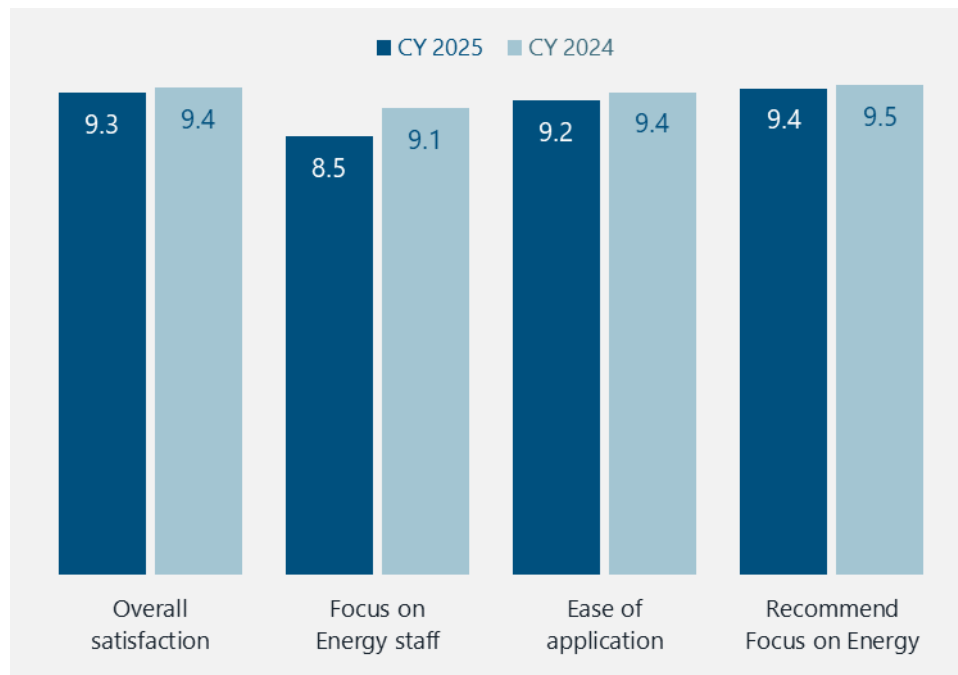
Source: Trade Ally Solutions Participant Satisfaction Survey Questions. “Overall, how satisfied are you with your most recent experience with Focus on Energy?” (CY 2025 n=229; CY 2024 n=1,007). “How satisfied are you with the Focus on Energy staff member who assisted you with your project?”¹⁷ (CY 2025 n=108; CY 2024 n=378). “How satisfied are you with the contractor(s) that you worked with on this project?” (CY 2025 n=214; CY 2024 n=939). “How satisfied are you with the ease of submitting your rebate application?” (CY 2025 n=227; CY 2024 n=995). “How likely are you to recommend Focus on Energy to others?” (CY 2025 n=230; CY 2024 n=1,006). The white box indicates that this satisfaction rating significantly differed between the years ($p < 0.10$).

¹⁷ All surveys gave respondents the opportunity to rate staff, though they were not required to give a rating since their participation in an offering may not have involved any contact with staff.

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As Figure 51 illustrates, CY 2025 Retail Smart Thermostat respondents were highly satisfied, giving the offering an average overall rating of 9.3, which is statistically equivalent to the average rating of 9.4 in CY 2024. From CY 2024 to CY 2025, participants gave high average satisfaction ratings across all aspects of the program. The lowest average satisfaction rating in CY 2025 was for Focus on Energy staff at 8.5, though only 18 of 124 survey respondents offered ratings for staff (most participants in this offering do not interact with staff).

Figure 51. CY 2025 and CY 2024 Retail Smart Thermostats Satisfaction Ratings

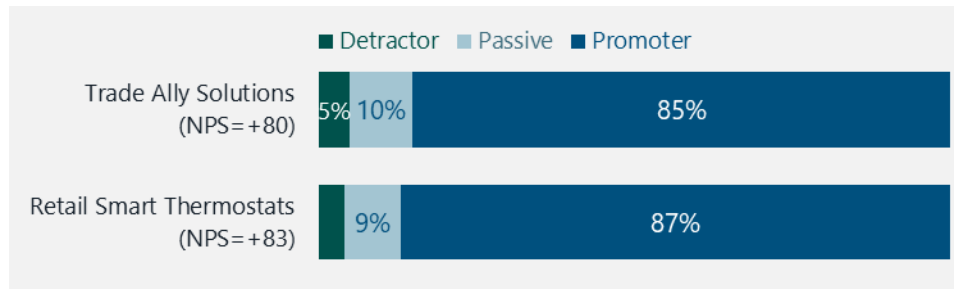


Source: Retail Smart Thermostats Participant Satisfaction Survey Questions. “Overall, how satisfied are you with your most recent experience with Focus on Energy?” (CY 2025 n=123; CY 2024 n=138). “How satisfied are you with the Focus on Energy staff member who assisted you with your application?” (CY 2025 n=18; CY 2024 n=20). “How satisfied are you with the ease of submitting your rebate application?” (CY 2025 n=122; CY 2024 n=137). “How likely are you to recommend Focus on Energy to others?” (CY 2025 n=124; CY 2024 n=138). None of the differences between years are statistically significant.

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CY 2025 participants gave high ratings for their likelihood to recommend Focus on Energy, averaging 9.3 for Trade Ally Solutions and 9.4 for Retail Smart Thermostats. Using these survey data, the evaluation team calculated an NPS based on customers' likelihood to recommend Focus on Energy. The NPS is expressed as an absolute number between -100 and +100, representing the difference between the percentage of promoters (respondents giving a rating of 9 or 10) and detractors (respondents giving a rating of 0 to 6). The Trade Ally Solutions NPS of +80 in CY 2025 was similar to the +83 score in CY 2024. The NPS for Retail Smart Thermostats was also high, at +83 in CY 2025, similar to the +84 it received in CY 2024. Net promoter scores and the distribution of promoters and detractors for CY 2025 are shown in Figure 52.

Figure 52. CY 2025 Trade Ally Solutions and Retail Smart Thermostats Net Promoter Scores

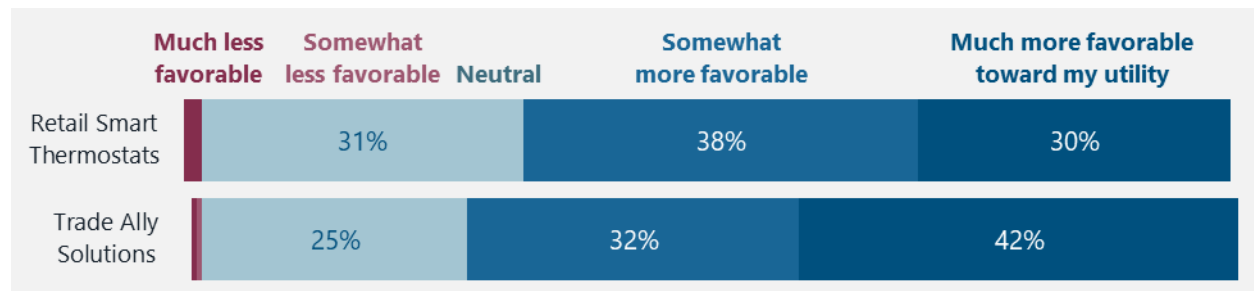


Source: CY 2025 Trade Ally Solutions and Retail Smart Thermostats Participant Satisfaction Survey Question: "How likely are you to recommend Focus on Energy to others?" (Trade Ally Solutions n=230; Retail Smart Thermostats n=124). Note: Unlabeled segments represent 4% or less of respondents.

Most respondents were aware that the offering they participated in was delivered in partnership with their local utility before receiving the satisfaction survey. Sixty-eight percent (n=221) of Trade Ally Solutions survey respondents were aware of the utility partnership in CY 2025, up from 61% in CY 2024 (n=1,000). Among Retail Smart Thermostat respondents, 71% (n=122) were aware of the utility partnership in CY 2025, similar to the previous year (72%, n=138).

Surveys asked participants if Focus on Energy offerings affected their opinion of their utilities (Figure 12). Seventy-four percent of Trade Ally Solution respondents and 68% of Retail Smart Thermostat respondents reported that their opinions had become *much more favorable* or *somewhat more favorable*. Only 1% or 2% of respondents' opinions of their utility became *much less favorable* or *somewhat less favorable*.

Figure 53. Trade Ally Solutions' Influence on Participants' Opinions of Utilities



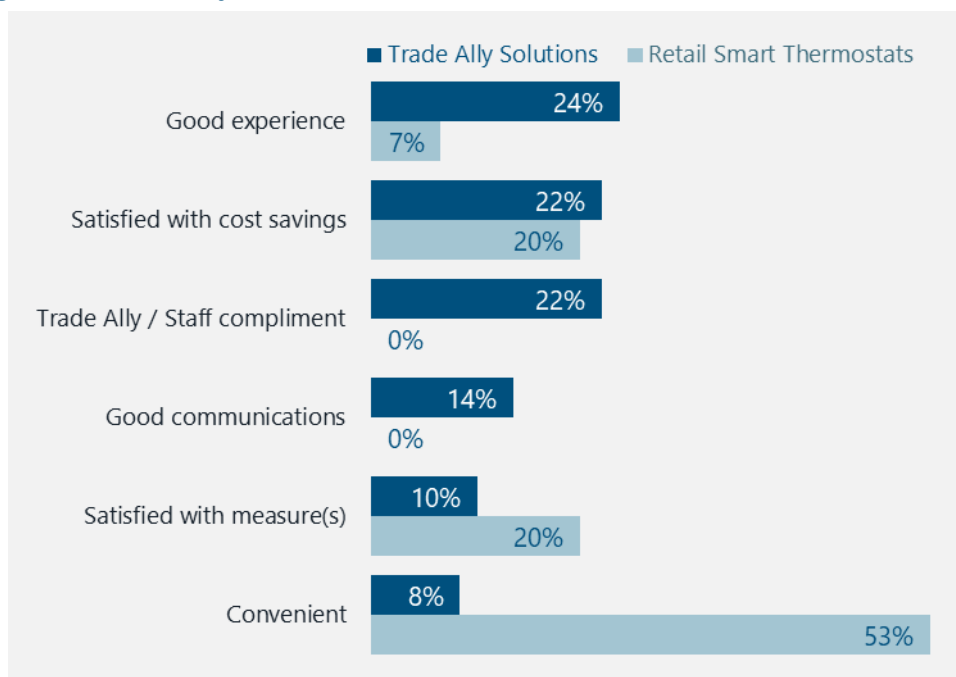
Source: CY 2025 Trade Ally Solutions and Retail Smart Thermostats Participant Satisfaction Survey Question: "How have these offerings affected your opinion of your energy utility, if at all?" (Trade Ally Solutions n=205, Retail Smart Thermostats n=114). Note: Unlabeled segments represent 2% or less of respondents.

Participant Feedback and Suggestions for Improvement

The customer satisfaction survey asked participants if they had any comments or suggestions for improving Trade Ally Solutions. Of the 233 participants who responded, 32% provided open-ended feedback, which the team coded into a total of 106 mentions. Of these mentions, 59 were positive or complimentary comments (56%), and 47 were suggestions for improvement (44%). Of the 124 participants who responded to the Retail Smart Thermostats survey, 18% provided open-ended feedback, which the team coded into a total of 35 mentions. Of these mentions, 15 were positive or complimentary comments (43%), and 14 were suggestions for improvement (57%).

The most common responses from Trade Ally Solutions respondents reflected a generally good experience (24%), satisfaction with the cost savings (22%), and good experiences with trade allies and staff (22%). Among Retail Smart Thermostat respondents, the most common positive comments reflected the ease and convenience of participating (53%), satisfaction with the measures (20%), and satisfaction with cost savings (20%). Figure 54 summarizes the positive responses for both surveys.

Figure 54. Trade Ally Solutions and Retail Smart Thermostats—Positive Comments



Source: CY 2025 Trade Ally Solutions and Retail Smart Thermostats Participant Satisfaction Survey Question: “Please tell us more about your experience and any suggestions for improvement.”
 (Total positive mentions Trade Ally n=59, Retail Smart Thermostats n=15)

When asked for suggestions for improvement, the most common suggestion from Trade Ally Solutions respondents was to improve communications about the offering (26%), which was also the most common suggestion in CY 2024 (38%). Increasing incentive amounts was the second-most frequently mentioned suggestion in CY 2025 (21%), whereas reducing delays for rebate payments was second in CY 2024 (19%) and in CY 2023 (22%).

CY 2025 Retail Smart Thermostat respondents most often suggested improving communication (25%). In CY 2024, the most common suggestion was to increase the offering scope to include more types of efficient equipment (29%). Increasing the scope was a less common suggestion in CY 2025 (9%).

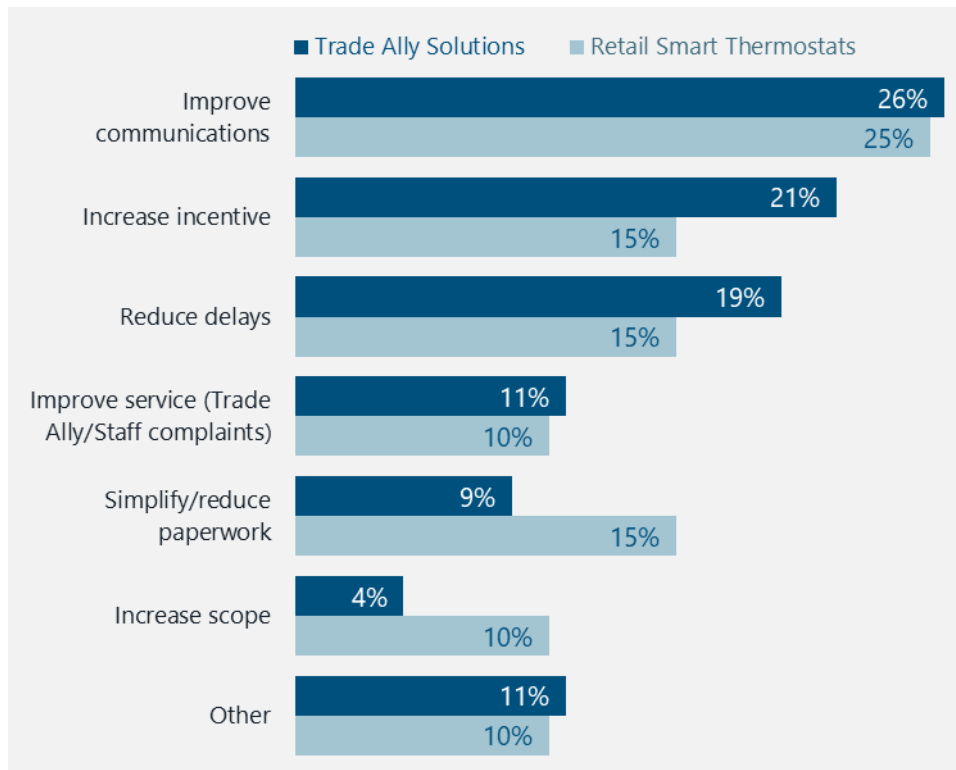
Suggestions about improving communications typically focused on increasing public awareness for the program, providing more information about contractors and their location on the Focus on Energy website, clarifying program qualifications, and providing more support for customers.

Suggestions to expand the scope of the offering included providing annual HVAC checkup incentives to encourage more consistent maintenance, providing incentives for electrical upgrades (specifically for older homes where electrical issues could prevent upgrades), and making it easier for a single owner of a multifamily property to receive multiple incentives for smart thermostats.

In CY 2025, some comments were categorized as “other.” These responses included suggestions to improve measures, extend rebate deadlines, and improve shipping and tracking.

Figure 55 summarizes the suggestions for improvement from both surveys.

Figure 55. Trade Ally Solutions and Retail Smart Thermostats Suggestions for Improvement

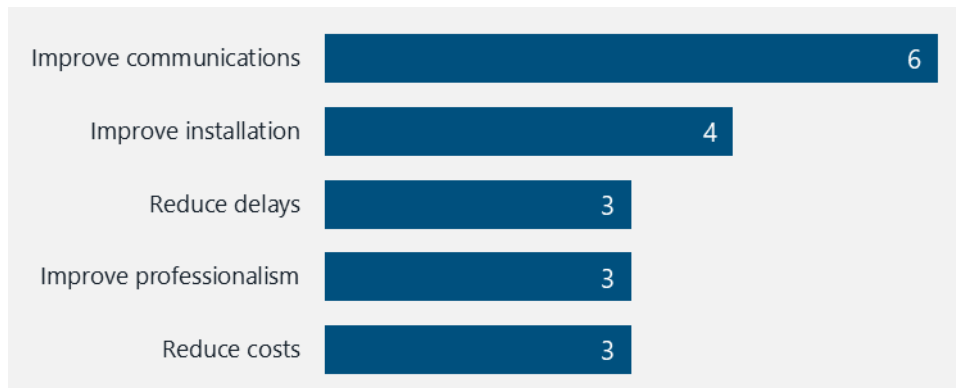


Source: CY 2025 Trade Ally Solutions and Retail Smart Thermostats Participant Satisfaction Survey. “Please tell us more about your experience and any suggestions for improvement.”
 (Total suggestions for improvement mentions Trade Ally n=47, Retail Smart Thermostats n=20).

The customer satisfaction survey also asked respondents if they had any feedback on their experience with the trade allies who worked on their project. The majority of these comments praised the contractors for doing a good job, consistent with their high average satisfaction rating of 9.3 for the contractors who worked on their projects. Eleven respondents (5% of participants surveyed) who rated their installation contractor an 8 or less out of 10 provided suggestions for improvement, which the evaluation team coded into 19 mentions. The most common issues in CY 2025 involved problems with communications (six mentions) and with the installation work performed (four mentions), which were also the most common issues mentioned by CY 2024 respondents. Suggestions about communications frequently focused on miscommunications regarding the work to be completed and its timing. Suggestions to improve installation processes, primarily for installations that were not completed properly and required additional or follow-up work.

Figure 56 summarizes respondents’ suggestions for improving the contractor experience.

**Figure 56. Trade Ally Solutions
Suggestions for Improving Contractor Experience**



Source: CY 2025 Trade Ally Solutions Participant Satisfaction Survey Question: “Please tell us more about your experience with the contractor(s) you worked with on this project. Any feedback provided shall remain anonymous.” (Total suggestions for improvement mentions by respondents who rated their contractor 8 or less out of 10: n=19).

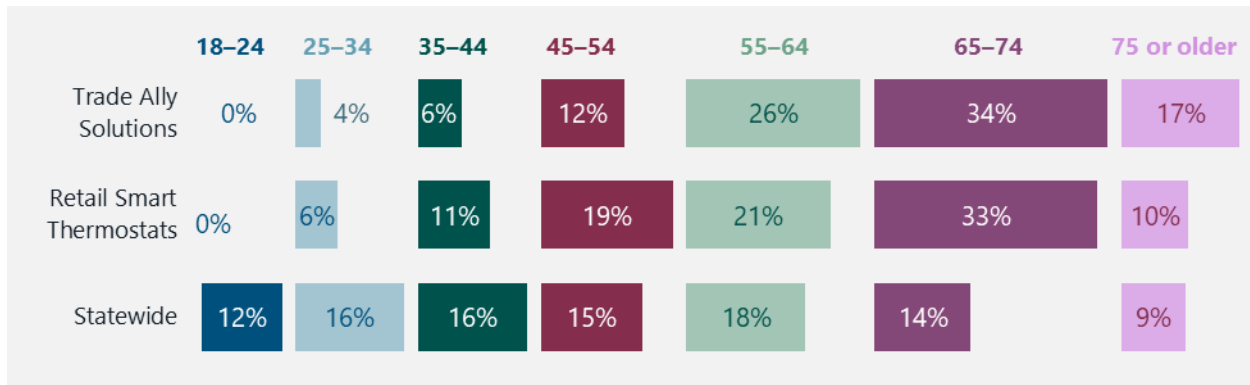
Demographics

The customer satisfaction survey asked respondents for their age and income. The self-reported age distribution of CY 2025 Trade Ally Solutions participants was very similar to the distribution in previous years, with respondents reporting a median age between 65 and 74. Seventy-eight percent of Trade Ally Solutions respondents were age 55 or older, indicating that participants tended to be older than the statewide average (41% age 55 or older). Retail Smart Thermostats respondents also reported age distributions very similar to previous years and tended to be older than the statewide average (64% age 55 or older compared to 41% statewide), although their median age of 55 to 64 was younger than that of Trade Ally Solutions respondents.

Trade Ally Solutions respondents’ median household income was between \$75,000 and \$100,000, matching the statewide median income. Retail Smart Thermostats respondents reported a higher median income between \$100,000 and \$150,000.

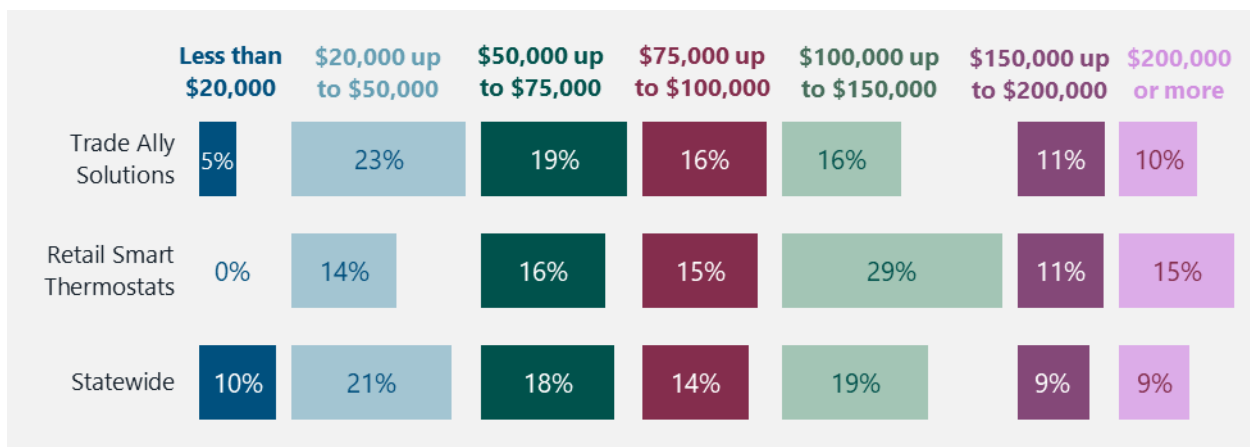
Figure 57 and Figure 58 summarize respondents' age and income, respectively.

Figure 57. Trade Ally Solutions and Retail Smart Thermostats—Participant Age



Source: CY 2025 Trade Ally Solutions and Retail Smart Thermostats Participant Satisfaction Survey Question: “Which of the following categories best represents your age?” (Trade Ally n=218, Retail Smart Thermostats n=113). U.S. Census 2024 ACS, Selected Social Characteristics in the Wisconsin.

Figure 58. Trade Ally Solutions and Retail Smart Thermostats—Participant Income Level

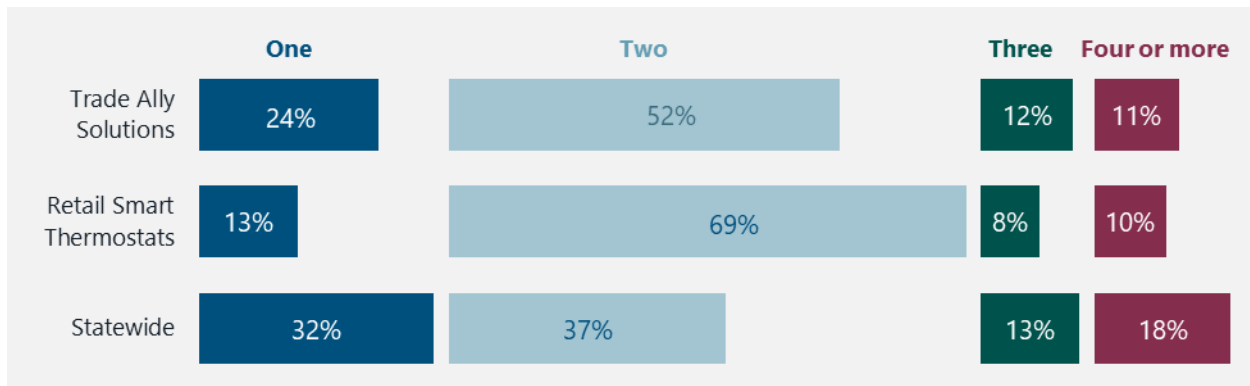


Source: CY 2025 Trade Ally Solutions and Retail Smart Thermostats Participant Satisfaction Survey Question: “Which category best describes our total household income before taxes?” (Trade Ally n=167, Retail Smart Thermostats n=80). U.S. Census 2024 ACS, Selected Social Characteristics in Wisconsin.

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Most respondents lived in two-person households (52% Trade Ally Solutions, 69% Retail Smart Thermostat), which was higher than the statewide rate (37%), as shown in Figure 59.

Figure 59. Trade Ally Solutions and Retail Smart Thermostats—Participant Household Size



Source: CY 2025 Trade Ally Solutions and Retail Smart Thermostats Participant Satisfaction Survey.
 “Counting yourself, how many people live in your household on a full-time basis today? Please include everyone who lives in your home and exclude anyone just visiting or children who may be away at college or in the military.” (Trade Ally n=212, Retail Smart Thermostats n=114).
 U.S. Census 2024 ACS, Selected Social Characteristics in Wisconsin.

6.5. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a demand-side management offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III includes a description of the TRC test.

Table 67 lists the CY 2025 incentive costs for the Residential Trade Ally Solutions Program.

Table 67. CY 2025 Residential Trade Ally Solutions Incentive Costs

Offering	Incentive Costs
Heating and Cooling	\$91,666
Insulation and Air Sealing	\$3,431,028
Tribal	\$23,000
Total	\$3,545,694

The evaluation team found that the CY 2025 Residential Trade Ally Solutions Program was cost-effective (1.44). Table 68 lists the evaluated costs and benefits.

Table 68. CY 2025 Residential Trade Ally Solutions Costs and Benefits

Cost and Benefit Category	Total
Costs	
Administration Costs	\$186,225
Delivery Costs	\$2,048,425
Incremental Measure Costs	\$13,094,100
Total Non-Incentive Costs	\$15,328,750
Benefits	
Electricity Benefits (kWh)	\$1,209,823
Capacity Benefits (kW)	\$9,035,857
Transmission and Distribution (T&D) Benefits (kW)	\$2,587,602
Gas Benefits	\$3,889,890
Emissions Benefits	\$5,328,958
Total TRC Benefits	\$22,052,130
Net TRC Benefits	\$6,723,380
TRC Benefit/Cost Ratio	1.44

6.6. Outcomes and Recommendations

The evaluation team presents the following outcomes and recommendations based on the CY 2025 evaluation.

Outcome 1. Almost all Retail Smart Thermostats offering participants were highly satisfied with their retail smart thermostats, used them for both heating and cooling, found the installation process easy, and applied for their rebate themselves. This indicates that the program is well regarded among participants and that they are happy with their equipment.

Outcome 2. The majority of participants paid close attention to their home’s energy use, planned on making additional efficiency improvements, and believed it was important to conserve resources and save energy. However, many were not aware of other Focus on Energy programs or utility demand response programs. This provides an opportunity to educate customers about their options for efficiency improvements and to engage them with other Focus on Energy programs.

Recommendation 2a. Prompt applicants to apply for other Focus on Energy programs upon submitting their first application. Sending an automatic follow-up email or including a link to other Focus on Energy programs after smart thermostat applications are submitted online will help participants become more aware of these programs.

Recommendation 2b. Coordinate with utilities to increase awareness of demand response opportunities. Help utilities provide their customers with information about demand response opportunities. If possible,

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incorporate opportunities within the Retail Smart Thermostats offering materials and webpages to increase awareness and program enrollment.

Outcome 3. Many customers replaced existing smart thermostats with new units available through the program. This indicates that the penetration of smart thermostats is high among program participants.

Outcome 4. Only 5% of customers said they heard about the Retail Smart Thermostats offering via mail, while 30% said that direct mail is their preferred outreach method. There is a large discrepancy between the proportion of customers who reported learning about the program by mail and those who prefer mail as an outreach method, suggesting an opportunity for additional outreach.

Recommendation 4. Increase the presence of direct, targeted mailings within advertising and outreach campaigns. Given the familiarity with and willingness to participate in energy efficiency programs identified in Outcome 2, smart thermostat customers appear to be good candidates for mailings that provide information about other offerings.

7. NONRESIDENTIAL PROGRAMS

This section presents the CY 2024 evaluation results for these nonresidential programs and their offerings, by chapter.

Agribusiness Program

- Agribusiness offering

Business and Industry Program

- Commercial and Industrial offering
- Energy Design Assistance/Energy Design Review offering

Large Industrial Program

- Large Industrial offering
- Energy Design Assistance/Energy Design Review offering

Schools and Government Program

- Schools offering
- Government offering
- Energy Design Assistance/Energy Design Review offering

Nonresidential Cross-Cutting Research

- Trade Ally Interviews (across all programs)
- Participant Surveys (Business and Industry and Large Industrial Programs)

8. Agribusiness Program

Through the Agribusiness Program, Focus on Energy offers technical assistance and financial incentives to businesses engaged in growing and producing grain, livestock, milk, poultry, fruits, vegetables, bees and honey, fish, shellfish, or other common agricultural products. Processors of agricultural products, such as grain elevators, feed mills, or cheese producers, are not classified as agricultural production and are served through other nonresidential programs.

The program is administered by APTIM and implemented by CESA 10.

The Agribusiness Program consists of one primary offering for agricultural businesses, comprising prescriptive and custom incentives:

- **Prescriptive rebates** are offered for standard equipment installations or replacements in an existing building or new construction.
- **Custom incentives** are offered for nonstandard equipment installations or replacements in existing buildings or new construction.

In addition, the program provides secondary participation opportunities:

- **Compressed Air Survey (August 2023-Present):** The compressed air survey promotes maintenance of compressors and leak repair at dairy farms and the resulting energy savings. It is also intended to complement dairy refrigeration tune-ups and is available to dairy farms of all sizes. In CY 2025, Trade Allies received up to 100% of the survey and leak-repair costs, up to \$200 per air compressor system. Trade allies had to be registered to receive the incentive, though not prior to completing the survey.
- **Dairy Refrigeration Tune-Ups (2015-Present):** Registered trade allies may perform tune-ups at dairy farms of all sizes to ensure refrigeration equipment is operating at peak efficiency. In CY 2025, trade allies received up to 100% of the tune-up cost, up to \$40 per compressor. Trade allies and customers are encouraged to conduct tune-ups annually.
- **Grain Dryer Tune-Ups (June 2023-Present):** Grain dryer tune-ups provide resources for crop farms to tune up their grain drying equipment on a regular basis to keep it operating at peak efficiency. The incentive targets corn-producing and drying agribusinesses. In CY 2025, registered trade allies received up to 100% of the tune-up cost, up to \$100 per dryer. Trade allies and customers are encouraged to conduct tune-ups annually. Trade allies had to be registered to receive the bonus, though not prior to completing the tune-up.
- **Project Assessment Incentive (January 2014-Present):** The project assessment incentive (PAI) provides customers with the opportunity to undergo an energy assessment completed by a trade ally to identify the energy savings potential in complex custom energy projects (resulting in an eligible custom project). In CY 2025, the incentive was available to all Agribusiness customers and covered 50% of the assessment costs or 20% of the estimated annual energy cost savings, up to \$15,000. Biogas and biomass PAI are also available for new or underutilized existing systems. The PAI opportunity requires pre-approval by Focus on Energy.

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- Pump Assessment and Variable-Speed Drive Bonus (July 2021-Present):** This assessment identifies pumping system inefficiencies within municipal water, wastewater, and agriculture irrigation systems. In CY 2025, agricultural customers with pumps of 40 horsepower or greater that operated at least 500 hours per year could receive an incentive equal to 100% of the assessment cost, up to \$500 per assessed pump. Participants could additionally receive a 50% bonus for any variable-speed drive pumps installed as a result of the pump assessment (up to \$2,000).

Table 69 summarizes the performance and savings impacts of the Agribusiness Program in CY 2025.

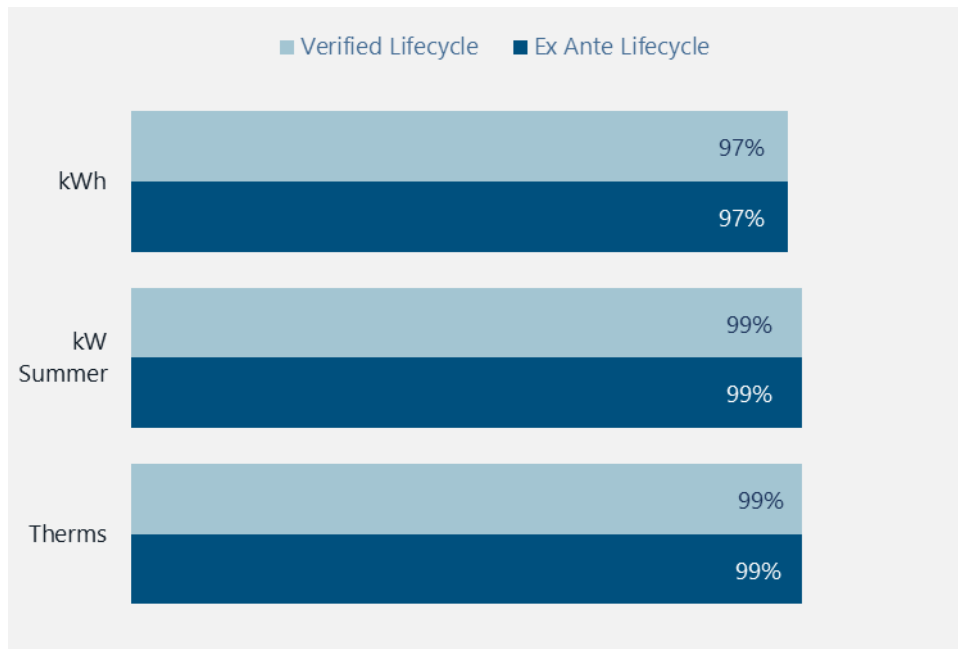
Table 69. CY 2025 Agribusiness Program Summary

Item	Units	CY 2025
Incentive Spending	\$	\$2,726,255
Participation	Number of Participants	761
Verified Gross Lifecycle Savings	kWh	636,873,485
	kW Summer	6,361
	kW Winter	3,366
	therms	8,177,178
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%
Annual NTG Ratio	% (MMBtu)	78%
Net Annual Savings	kWh	33,598,384
	kW Summer	4,961
	kW Winter	2,626
	therms	370,307
Net Lifecycle Savings	MMBtu	2,332,769
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	4.38

8.1. Achievement Against Goals

In CY 2025, the Agribusiness Program achieved 97% of its electric energy savings goal, 99% of its summer peak demand savings goal, and 99% of its therm savings goal based on verified lifecycle savings at the program level. Figure 60 summarizes these results.

Figure 60. CY 2025 Agribusiness Program Achievement of Gross Lifecycle Savings Goals



Note: 100% *ex ante* gross lifecycle savings reflect the implementer’s contract goals for CY 2025. Verified gross lifecycle savings contribute to the administrator’s portfolio-level goals. Winter kW goals were not established for CY 2025.

8.2. Impact Evaluation

This section presents the findings from the CY 2025 impact evaluation of the Agribusiness Program.

8.2.1. Impact Evaluation Methodology

The evaluation team designed its CY 2025 impact evaluation, measurement, and verification approach to integrate multiple perspectives into its assessment of program performance. The team used the following approaches to measure the impact of the Agribusiness Program:

- Tracking database review
- Engineering desk reviews
- Virtual verification site visits and interviews
- Engineering savings calculations

Table 70 lists the specific sample sizes used for the impact evaluation of the Agribusiness measures. A discussion with additional details about these activities and their findings follows.

Table 70. CY 2025 Agribusiness Program Impact Evaluation Activities and Sample Sizes

Total Measures	Impact Evaluation Sample		
	Desk Reviewed Measures	Virtually Verified Measures	% Sampled (by <i>Ex Ante</i> MMBtu savings)
2,473	43	22	16%

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Engineering Desk Reviews

The evaluation team reviewed all available project documentation in SPECTRUM for a sample of 43 measures offered through the CY 2025 Agribusiness Program. This review included an assessment of the implementer's savings calculations and methodology. The team relied on the applicable TRM and other relevant secondary sources as needed. Secondary sources included energy codes and standards, case studies, and energy efficiency program evaluations of comparable measures (based on geography, sector, measure application, and date of issue).

For prescriptive measures, the team used the Focus on Energy 2025 TRM and associated work papers as the primary sources to determine methodology and data in nearly all cases. For hybrid and custom measures, the team reviewed the SPECTRUM savings analysis workbooks and adjusted inputs and methodologies as necessary based on engineering judgment and project documentation.

To conduct the program's impact analysis, the evaluation team selected a representative sample of measures and then extrapolated the findings from the random sample to the larger population. In CY 2025, this process used purposive and proportional sampling by the following process:

- **Census sampling** selected the measures with the largest savings by offering (called census measures) and used a percentage distribution analysis to determine the threshold of savings, since this varied by offering. The census sample included most measures larger than 5% of the program's lifecycle MMBtu savings. Because these measures were sampled with certainty (100% of the eligible highest saving measures were sampled), the team did not extrapolate the results to the offering's population.
- **Random sampling** selected measures from the offering's measure population (called randomly sampled measures). The team stratified the population by reported savings, fuel type, and potentially measure type to ensure the overall representativeness of the selected sample and then extrapolated the cumulative realization rate of randomly sampled measures by offering them to the remainder of each offering's population.

Virtual Verification Site Visits

The evaluation team conducted 22 virtual verification site visits, including interviews with the site contact. The site visits focused on sampled measures where the savings impact was high, the measure type was hybrid or custom, or there were outstanding questions that required clarification to complete the evaluation. During the site visits, the evaluation team verified the type and quantity of installed equipment, determined how the equipment was controlled, and documented operating hours. The team then verified the savings calculation input parameters based on operational and occupancy schedules, reported and observed setpoints, trend data, utility data, and any other relevant details identified before contact with the site.

8.2.2. Verified Gross Savings Results for the Agribusiness Program

Table 71 lists the first-year and lifecycle realization rates for the CY 2025 Agribusiness Program. Table 72 verified first-year and lifecycle savings for the program. The sampled projects represent 16% of the program lifecycle MMBtu savings. Overall, the program achieved a first-year evaluated realization rate of

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100%, weighted by total energy savings (MMBtu). Note that, at the measure level, there was variability in realization rates among fuel types. The team determined realization rates by strata, such as census and sample strata, and summed reported and verified savings at the offering level to arrive at savings and realization rates. Detailed findings, including factors affecting the realization rates, are discussed in the next section of this chapter.

Table 71. CY 2025 Agribusiness Program First-Year and Lifecycle Realization Rates

First-Year Realization Rate					Lifecycle Realization Rate		
kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
100%	100%	100%	100%	100%	100%	100%	100%

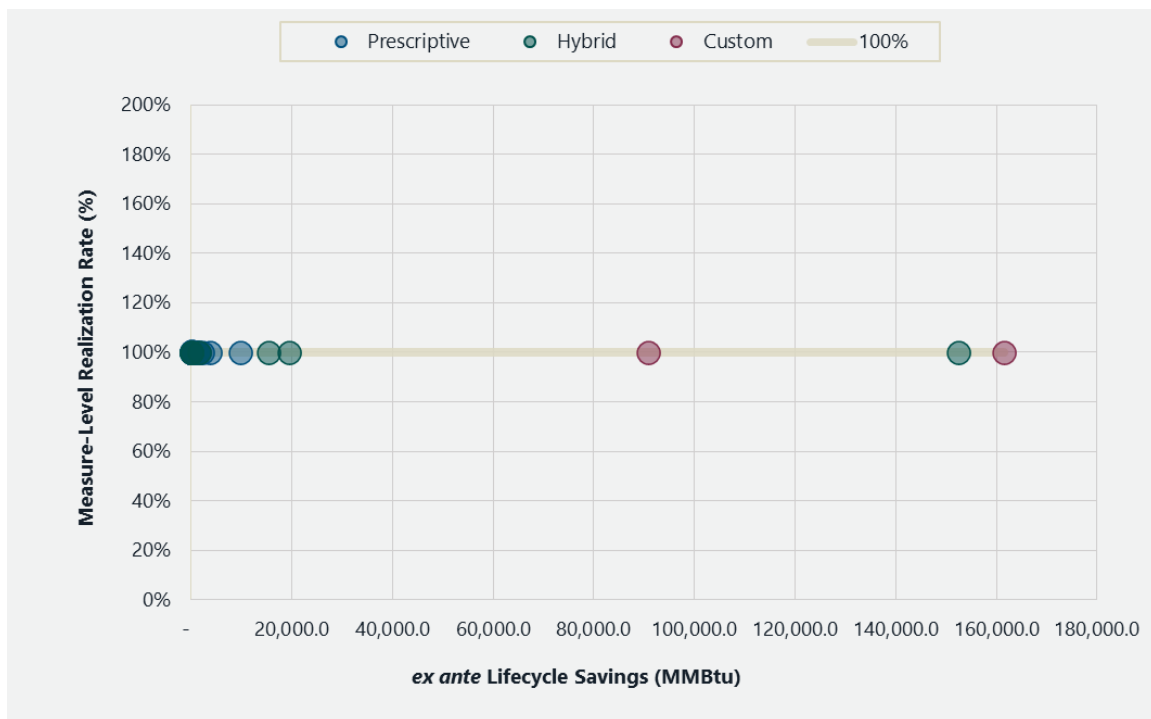
Table 72. CY 2025 Agribusiness Program First-Year and Lifecycle Verified Energy Savings Summary

Verified First-Year Savings					Verified Lifecycle Savings		
kWh	kW Summer	kW Winter	therms	MMBtu ^a	kWh	therms	MMBtu ^a
43,074,851	6,361	3,366	474,753	194,447	636,873,485	8,177,178	2,990,730

^a Verified kWh and therm savings may not sum to verified MMBtu values due to conversion/rounding associated with measure-level application of realization rates.

Figure 61 illustrates the magnitude of, and the associated lifecycle realization rates for, reported MMBtu savings for the sampled projects within the Agribusiness Program.

Figure 61. CY 2025 Agribusiness Program Sampling Results



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Several sampled measures deviated very slightly in first-year realization, but all rounded to 100% lifecycle MMBtu realization. The following describes the main factors affecting the realization rate:

- The evaluation team made adjustments to one randomly selected prescriptive measure that had very slight rounding errors made in the *ex ante* calculations. The modifications resulted in a kW summer demand realization rate of 104%; however, the resulting verified MMBtu realization rate was rounded to 100%.
- The evaluation team made adjustments to seven measures utilizing MMID 4403. *Ex ante* calculations appear to have used the Wisconsin TRM’s 2024 deemed kWh savings values rather than the updated values in the Wisconsin TRM 2025. Evaluated savings utilized Wisconsin TRM 2025, resulting in very slightly increased kWh first-year and lifecycle savings; however, the resulting verified MMBtu realization rates were rounded to 100% for all measures under MMID 4403.

Table 73 lists the CY 2025 *ex ante* and verified gross savings by first-year and lifecycle gross savings for the Agribusiness program.

Table 73. CY 2025 Agribusiness Program *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	43,074,851	6,361	3,366	474,753	43,074,851	6,361	3,366	474,753
Lifecycle Gross Savings	636,873,485	6,361	3,366	8,177,178	636,873,485	6,361	3,366	8,177,178

8.2.3. Verified Net Savings Results for the Agribusiness Program

The evaluation team used CY 2023 participant survey results to assess net savings for the CY 2025 Agribusiness Program. To calculate the NTG for each offering in CY 2025, the team combined the self-reported freeridership and participant spillover results using the following equation:

$$NTG = 1 - \text{Freeridership Ratio} + \text{Participant Spillover Ratio}$$

Table 74 shows the NTG ratios applied to the CY 2025 Agribusiness Program.

Table 74. CY 2025 Agribusiness Program NTG Ratios by Offering

Offering	Freeridership	Spillover	NTG Ratio
Agribusiness	22%	0%	78%

Table 75 shows the total lifecycle gross verified savings, lifecycle net savings, and final NTG ratio for the Agribusiness Program in CY 2025.

Table 75. CY 2025 Agribusiness Program Lifecycle Net Savings and NTG

Total Lifecycle Gross Verified Savings (MMBtu)	Total Lifecycle Net Savings (MMBtu)	NTG Ratio
2,990,730	2,332,769	78%

8.3. Process Evaluation

This section discusses process evaluation activities conducted in CY 2025 related to the Agribusiness Program and all nonresidential programs.

8.3.1. Process Evaluation Methodology

The evaluation team used in-depth interviews to assess Agribusiness Program participant satisfaction and to explore nonresidential program trade allies' preferences for receiving program communications.

Table 76 lists the data collection activities and sample sizes for all primary data collection.

Table 76. CY 2025 Agribusiness Program Process Evaluation Activities

Activity	CY 2025 Completes (n)
Program Documentation Review	✓
Ongoing Participant Satisfaction Surveys	19
Trade Ally Interviews	25 across all nonresidential programs

Program Documentation Review

The evaluation team reviewed the Agribusiness Program's implementation and marketing plans to understand the program's structure and its implementation in CY 2025. The team also reviewed miscellaneous documentation, like quarterly performance reports to the PSC from the program administrator, to understand program updates and progress in CY 2025.

Ongoing Participant Satisfaction Survey

Using contact information stored in SPECTRUM, the program administrator oversaw an ongoing web-based satisfaction survey of CY 2025 participants. There were two objectives for the satisfaction survey:

- Understand customer satisfaction on an ongoing basis and respond to any changes in satisfaction before the end of the annual reporting schedule
- Help to facilitate timely follow-up with customers to clarify and address service concerns

A total of 19 Agribusiness Program participants responded to the CY 2025 survey. The survey covered several topics, including overall satisfaction, satisfaction with offering staff and trade allies, the likelihood of recommending Focus on Energy, and other feedback.

Trade Ally Interviews

In CY 2025, the evaluation team conducted trade ally interviews that cut across all of Focus on Energy's nonresidential programs to explore optimal timing, frequency, and medium of program communications. Interviews also collected feedback on prescriptive rebate activity and general program participation. The details of the methodologies and findings of this research are described in the *Nonresidential Cross-Cutting Research* section of this report.

8.3.2. Program Design and Delivery

Custom and prescriptive incentives are the primary opportunities for participation in the Agribusiness Program; they are intended to reduce the upfront costs of energy efficiency projects. Customers can apply

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for incentives directly through Focus on Energy or through their trade ally, a program energy advisor, or their utility account representative.

The Agribusiness Program has four dedicated energy advisors, each covering a geographic region of the state. The energy advisors manage relationships with trade allies and large and repeat customers in their region. They promote program opportunities to trade allies and encourage them to identify customers and projects to expand customer awareness and participation in the program.

Special Promotions and Incentives

In CY 2025, Focus on Energy offered several bonuses and targeted participation opportunities through the Agribusiness Program:

- **Custom Design Trade Ally Bonus.** Launched in January 2024, the custom design bonus encourages trade allies to promote Focus on Energy during custom project development and increase project savings. In CY 2025, trade allies received a 10% bonus on the customer incentive (up to \$10,000) for completed projects. Trade allies had to be registered to receive the bonus.
- **Greenhouse Energy Audit.** Launched in January 2025, this offering was developed to engage greenhouse customers in facility audits to identify top energy conservation measures. It offered a 10% project-planning bonus for any identified measures and for future projects completed in the same year. The offering was available to any greenhouse producer.
- **Propane Incentives.** In partnership with the Office of Energy Innovation and funded through a U.S. Department of Energy State Energy Program Grant, this incentive was developed in CY 2024 to provide incentives for energy-efficient propane equipment equal to those for natural gas equipment. Customers served by a participating electric utility were eligible to receive incentives for installing equipment through June 30, 2025.
- **Trade Ally Prescriptive Bonus.** This bonus was developed to encourage trade allies to promote the Focus on Energy program. In CY 2025, trade allies received a bonus equal to 15% of the customer incentive, or \$30 (whichever was greater), for completed projects. Trade allies had to be registered to receive the bonus.

8.3.3. Ongoing Participant Satisfaction Survey

Throughout CY 2025, the administrator invited all Agribusiness participants with valid email addresses to take a web-based satisfaction survey. The following sections present survey results from the 19 participants who responded.

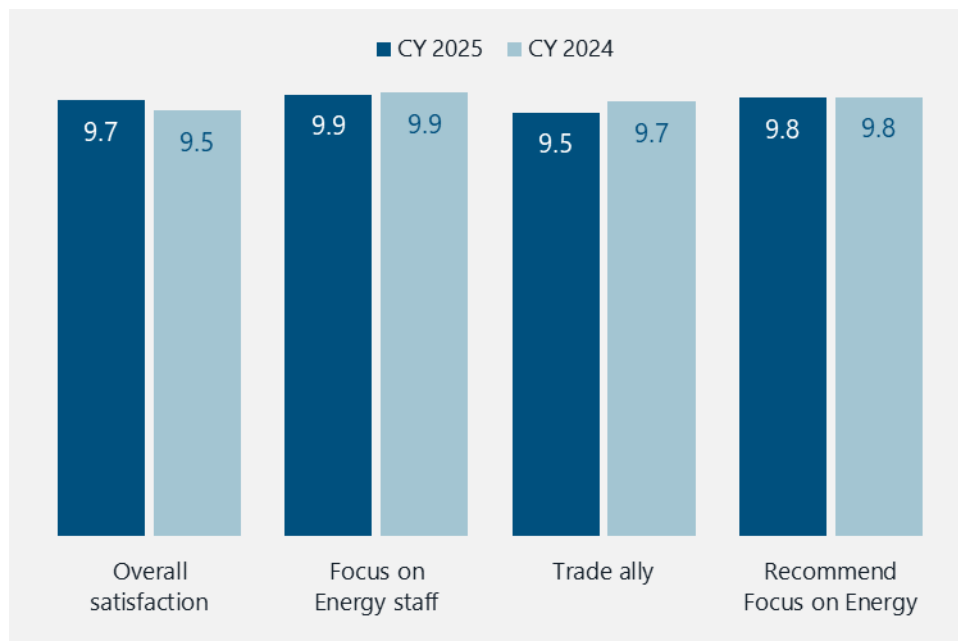
Awareness

The participant satisfaction survey asked respondents how they learned about the Agribusiness Program. In CY 2025, four out of 16 respondents who could recall said they learned about the program from Focus on Energy advisors and staff, three mentioned farm shows, and three said previous experience with Focus on Energy offerings. Other sources of information mentioned included trade allies, friends and colleagues, manufacturers and distributors, and the Focus on Energy website.

Participant Satisfaction

The survey asked participants to rate their satisfaction with the program and their likelihood of recommending Focus on Energy on a scale of 0 to 10, where 10 indicated the highest degree of satisfaction or likelihood and 0 the lowest. As Figure 62 shows, CY 2025 respondents gave the Agribusiness Program an average overall satisfaction score of 9.7, which is statistically equivalent to 9.5 in CY 2024. Ratings for satisfaction with staff and trade allies, and the likelihood of recommending Focus on Energy offerings, remained high in CY 2025 and were statistically equivalent to CY 2024.¹⁸

Figure 62. Agribusiness Program Participant Satisfaction and Likelihood Ratings



Source: Agribusiness Program Participant Satisfaction Survey Questions. “Overall, how satisfied are you with your most recent experience with Focus on Energy?” (CY 2025 n=19; CY 2024 n=17). “How satisfied are you with the Energy Advisor or Focus on Energy staff member who assisted you with your project?” (CY 2025 n=15; CY 2024 n=16). “How satisfied are you with the contractor(s) that you worked with on this project?” (CY 2025 n=11; CY 2024 n=15). “How likely are you to recommend Focus on Energy to others?” (CY 2025 n=19; CY 2024 n=17). There are no statistically significant differences between CY 2025 and CY 2024 ratings.

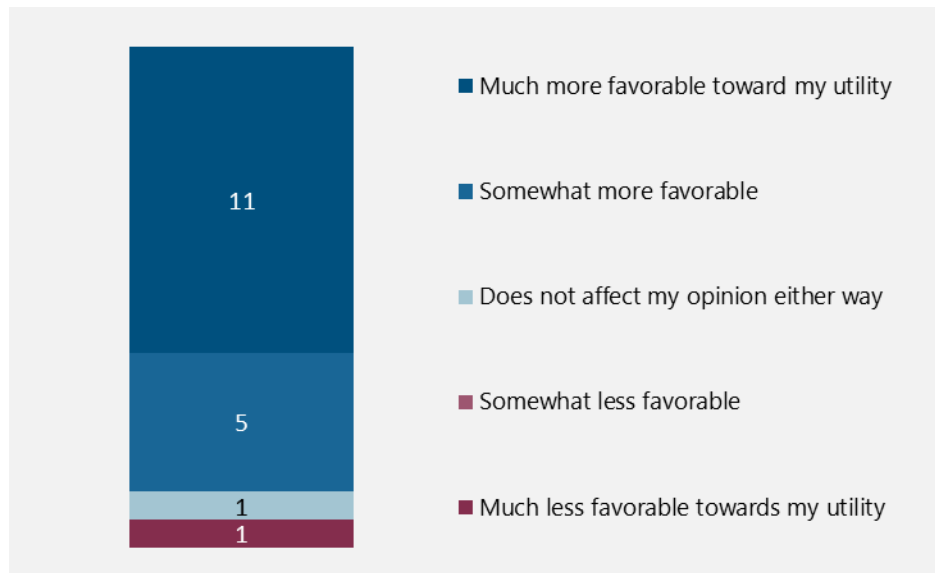
Using the survey data, the evaluation team calculated an NPS based on customers’ likelihood to recommend Focus on Energy. The NPS is expressed as an absolute number between -100 and +100, representing the difference between the percentage of promoters (respondents rating 9 or 10) and detractors (respondents rating 0 to 6). High NPS scores (+70 or higher) are theoretically predictive of customer behaviors, such as participating in another offering, implementing additional energy improvements, and referring Focus on Energy offerings to others. The Agribusiness Program’s NPS was +95 for CY 2025 based on 19 surveys, similar to the CY 2024 NPS of +100 based on 17 surveys.

¹⁸ The number of participants who completed a survey does not always match the number of responses for each question as some participants skipped or did not know answers to questions.

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Respondents were asked whether they were aware that the Agribusiness Program was offered in partnership with their local utility before receiving the satisfaction survey; only 10 of 19 (53%) were aware of the partnership in CY 2025, a decrease from 88% (15 of 17) in CY 2024. Respondents were also asked whether Focus on Energy offerings affected their opinion of their utilities. As Figure 63 shows, a large majority (16 of 18) said their opinion had become *much more favorable* or *somewhat more favorable* due to their utility’s partnership Focus, while only one said their opinion had become *much less favorable*, and one said their opinion did not change.

Figure 63. Agribusiness Program’s Influence on Participants’ Opinions of Utilities

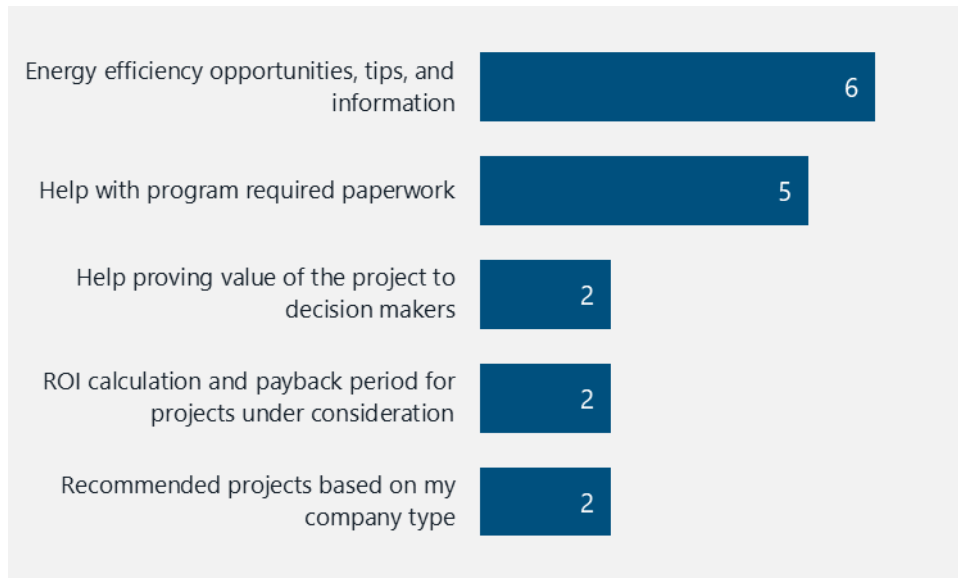


Source: Agribusiness Participant Satisfaction Survey Question: “How have these offerings affected your opinion of your energy utility, if at all?” (n=18). No responses were received for the option *somewhat less favorable*.

The survey asked respondents how Focus on Energy could best support their organization with future projects. The most frequent response in CY 2025 was energy efficiency opportunities, tips, and information (six of 17 respondents), which was also the most frequent response in CY 2023 and 2024. Five

of the CY 2025 respondents mentioned help with paperwork, whereas none did in CY 2024. Figure 64 shows a full breakdown of responses.

Figure 64. Participants' Most Valued Source of Support



Source: Agribusiness Participant Satisfaction Survey Question: “Aside from providing project incentive dollars, how can Focus on Energy best support your organization going forward?” (n=17)

Participant Feedback and Suggestions for Improvement

The survey asked participants if they had any comments or suggestions to improve the program. Of the 19 participants who responded, three provided open-ended feedback. One of these comments reflected a positive experience, highlighting convenience and timeliness. Two of the comments suggested that Focus on Energy should do more to promote its offerings, and both said they were unaware of its offerings until they encountered a booth at a farm show.

The satisfaction survey also included an open-ended question soliciting comments on participants’ experience with trade allies. Six Agribusiness respondents provided feedback, all of which was positive and complimentary, though one also commented, “The only negative [was] we had to chase him down to get the invoice information that we needed.” The respondent who made that comment rated their experience with their trade ally a 7 out of 10, which was the only trade ally rating lower than 8 out of 10 from CY 2025 respondents.

8.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a DSM offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. See Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III for a description of the TRC test. Table 77 lists the CY 2025 incentive costs for the Agribusiness Program.

Table 77. CY 2025 Agribusiness Incentive Costs

Offering	Incentive Costs
Agribusiness	\$2,726,255

The evaluation team found that the CY 2025 Agribusiness Program was cost-effective (4.38). Table 78 lists the evaluated costs and benefits.

Table 78. CY 2025 Agribusiness Costs and Benefits

Cost and Benefit Category	Total
Costs	
Administration Costs	\$116,104
Delivery Costs	\$1,734,440
Incremental Measure Costs	\$8,861,760
Total Non-Incentive Costs	\$10,712,304
Benefits	
Electricity Benefits (kWh)	\$10,644,502
Capacity Benefits (kW)	\$11,970,781
T&D Benefits (kW)	\$3,437,817
Gas Benefits	\$2,869,359
Emissions Benefits	\$18,018,186
Total TRC Benefits	\$46,940,645
Net TRC Benefits	\$36,228,341
TRC Benefit/Cost Ratio	4.38

8.5. Outcomes

The evaluation team identified the following outcomes for the Agribusiness Program based on the CY 2025 program evaluation activities. Additional outcomes and recommendations from the cross-cutting process evaluation activities can be found in the discussions of those specific research activities, as referenced in the *Nonresidential Cross-Cutting Research* section.

Outcome 1. Reported *ex ante* savings were highly accurate. First-year and annual MMBtu energy realization rates were 100% for the Agribusiness Program in CY 2025, indicating high accuracy in quantifying estimated energy savings.

Outcome 2. Agribusiness participant satisfaction remained high in CY 2025. Participants gave the program an overall satisfaction score of 9.7, which was statistically equivalent to 9.5 in CY 2024. This satisfaction is supported by the high NPS of +95 for CY 2025, suggesting that participants are likely to recommend Focus on Energy to others.

9. Business and Industry Program

Through the Business and Industry Program, Focus on Energy offers technical assistance and financial incentives for commercial and small- and medium-sized industrial customers who install energy-efficient or renewable energy measures.

The Business and Industry Program consists of two offerings:

- **Commercial and Industrial (C&I).** This offering is available to businesses not classified as agribusiness, multifamily, or large industrial facilities. Examples of eligible C&I businesses include hotels, restaurants, retail businesses, religious organizations, healthcare facilities, and manufacturers of goods or materials. The offering consists of both prescriptive rebates and custom incentives:
 - *Prescriptive rebates* are offered for standard equipment installations or replacements in an existing building or new construction. New construction customers can participate in Energy Design Assistance/Energy Design Review or prescriptive new construction incentives.
 - *Custom incentives* are offered for nonstandard equipment installations or replacements in existing buildings or new construction. Custom incentives are also available for non-solar PV renewable technologies, such as biogas, biomass, solar thermal, and wind technologies.
- **Energy Design Assistance/Energy Design Review (EDA/EDR).** This offering is available for new construction, major renovations, and addition projects over 5,000 square feet. It provides a whole-building energy analysis of multiple design options and incentives based on the building's overall modeled energy savings. This offering is also available to participants through the Large Industrial, Schools and Government, and Multifamily programs.

The program administrator is APTIM. The program implementer, Franklin Energy, oversees program management and delivery of the C&I offering. Willdan, the EDA/EDR implementer, conducts building analysis and energy modeling to support the EDA/EDR offering. With support from the administrator, the implementers' energy advisors promote and deliver the Business and Industry Program to customers and trade allies.

In addition to the prescriptive rebates, custom incentives, and EDA/EDR, the program provides the following additional opportunities for participation:

- **Compressed Air Energy Challenge (April 2024-Present):** The compressed air energy challenge offers compressed air survey incentives based on leaks identified, called on-the-spot repairs, versus the horsepower of a compressed air system, which is designed to offset the cost of servicing smaller industrial facilities. Customers who complete a compressed air survey, either for on-the-spot repair or for a standard prescriptive survey, receive a coupon for 20% off a future compressed air retrofit project. This opportunity is available to all Business and Industry customers with compressed air systems. In CY 2025, the program targeted five sites for on-the-spot repair incentives, with a not-to-exceed amount of \$20,000.

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- **Custom Design Team Bonus (January 2024-Present):** The design team bonus is available to trade allies completing a custom project and is considered an expansion of the prescriptive trade ally bonus. The bonus is intended to reward trade allies for supporting the lengthy or complex preapprovals often associated with custom projects, with the goal of building a pipeline for business programs. Trade allies must complete an impact statement, which is embedded in the custom workbook, and request the bonus prior to project preapproval. Trade allies must receive pre-approval to receive a bonus. This opportunity is available to all registered trade allies completing custom projects. In CY 2025, the bonus was calculated as 10% of total custom incentives, up to \$10,000.
- **Industrial Staffing Incentive (April 2023-2025):** This opportunity is available to customers in need of financial support to justify or offset staffing needed to complete energy-saving projects. The staffing incentive is based on the total value of staff time or a third-party subcontractor's time to manage qualifying energy efficiency projects identified on a project list submitted with the program application. Customers could also apply for custom and prescriptive incentives available for the completed projects. Project assessment incentives, retro-commissioning projects, and solar PV projects were not eligible for staffing incentives; however, projects identified through a previous PAI could be included on the project list if not completed. In CY 2025, customers could request up to \$100,000, limited to 50% of the expected annual cost savings for each project on the proposed project list. Customers could also receive an early partial payment of 30% of the incentive if they signed an agreement with a third-party energy management provider.
- **Nonprofit Efficiency Accelerator (October 2023-December 2025):** This opportunity assisted nonprofits (501 (c)(3) status organizations) in implementing energy-saving measures. The program offered two participation paths: (1) donation matching, where Focus on Energy matched funds raised by the organization for an energy efficiency project, and (2) an RFP, where nonprofit customers could request incentives higher than established program rates to support their specific needs. Focus on Energy deployed this offering in October 2023 and accepted applications through CY 2024, with all projects required to be implemented, including funds raised, by December 12, 2025. This opportunity was available to all customers with 501(c)(3) tax-exempt status, including churches, community organizations, and healthcare facilities.
- **Practical Energy Management (February 2023-Present):** Practical energy management (PEM) is a supplemental opportunity designed to help customers understand and benchmark their facility's energy use and develop an energy management plan. The program is available to all Business and Industry customers with facility utility greater than or equal to \$15,000 per year. PEM provides incentives for routine benchmarking, attendance at energy-related training, and promotion of success within the organization. Customers may enroll up to three facilities per 12-month period; each facility must meet the minimum annual utility cost of \$15,000 to qualify. In CY 2025, incentives were limited to \$2,700 per facility per 12-month period.
- **Project Assessment Incentive (January 2014-Present):** The PAI provides customers the opportunity to cost-share the development or engineering of complex energy-saving projects where energy savings are not immediately known. The PAI is designed for industrial facilities with complex equipment or processes, and assessments should yield a custom project. Focus on

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Energy must approve PAIs in advance of the assessment. In CY 2025, the incentive paid 50% of the assessment cost or 20% of the estimated annual energy cost savings, whichever was lower, up to \$15,000.

- **Retro-commissioning (January 2022-Present):** Retro-commissioning is the process of improving the performance and energy efficiency of building systems and equipment via low- and no-cost modifications to building controls and protocols. Incentives are based on square footage, with a base rate and additional incentives tied to reductions in energy use intensity. In CY 2025, incentives could cover up to 75% of the project cost, up to \$100,000 per project. The opportunity is available to all Business and Industry customers, but it is designed for properties older than five years and larger than 5,000 square feet.
- **Trade Ally Bonus (July 2023-Present):** The trade ally bonus is available to all registered trade allies completing a prescriptive project and is paid directly to trade allies to offset the effort required to compile and submit an incentive application. The bonus also serves as a recruitment and retention tool for the trade ally network, with program staff evaluating its continuation annually. In CY 2025, bonuses were calculated as the greater of \$30 or 15% of the total prescriptive incentive amount installed by the trade Ally, with no cap on prescriptive incentives.
- **Whole-Building Tune-Up (April 2022-December 2025):** The whole-building tune-up allows customers to upgrade common control systems without requiring a facility audit or verification data. The tune-up includes 14 optimization measures for heating, cooling, ventilation, and hot water systems, to be implemented on the same day by a trade ally. Trade allies submit applications online via Formstack. In CY 2025, customers could receive up to \$500 per measure implemented. Customers could apply for the same measure once every three years. Additionally, Trade Allies could receive a \$200 incentive for completing a building health report.

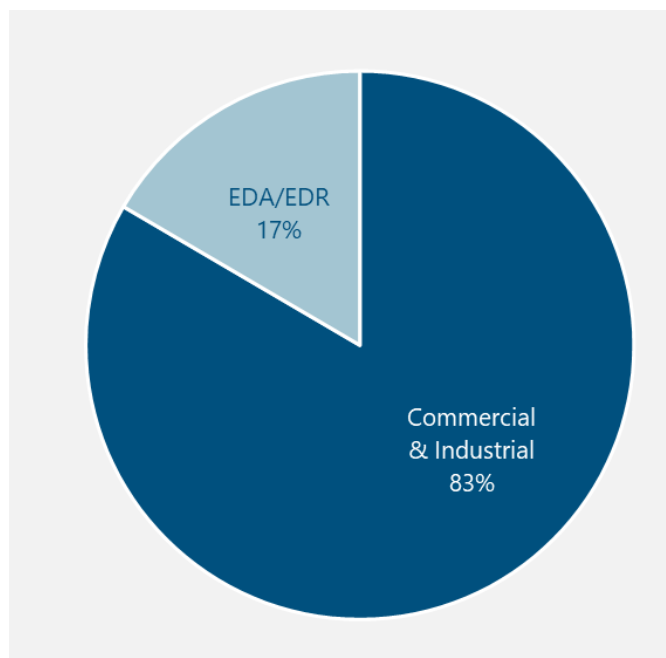
Table 79 summarizes the performance and savings impacts of the Business and Industry Program in CY 2025.

Table 79. CY 2025 Business and Industry Program Summary

Item	Units	CY 2025
Incentive Spending	\$	\$8,315,424
Participation	Number of Participants	1,313
Verified Gross Lifecycle Savings	kWh	1,339,731,800
	kW Summer	12,979
	kW Winter	10,078
	therms	34,974,295
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%
Annual NTG Ratio	% (MMBtu)	81%
Net Annual Savings	kWh	72,321,701
	kW Summer	10,501
	kW Winter	8,172
	therms	1,623,248
Net Lifecycle Savings	MMBtu	6,561,348
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	3.28

Figure 65 shows the proportion of Business and Industry Program savings by offering. In CY 2025, the C&I offering contributed 83% of the total verified gross lifecycle MMBtu savings.

Figure 65. CY 2025 Business and Industry Program Gross Lifecycle Savings by Offering

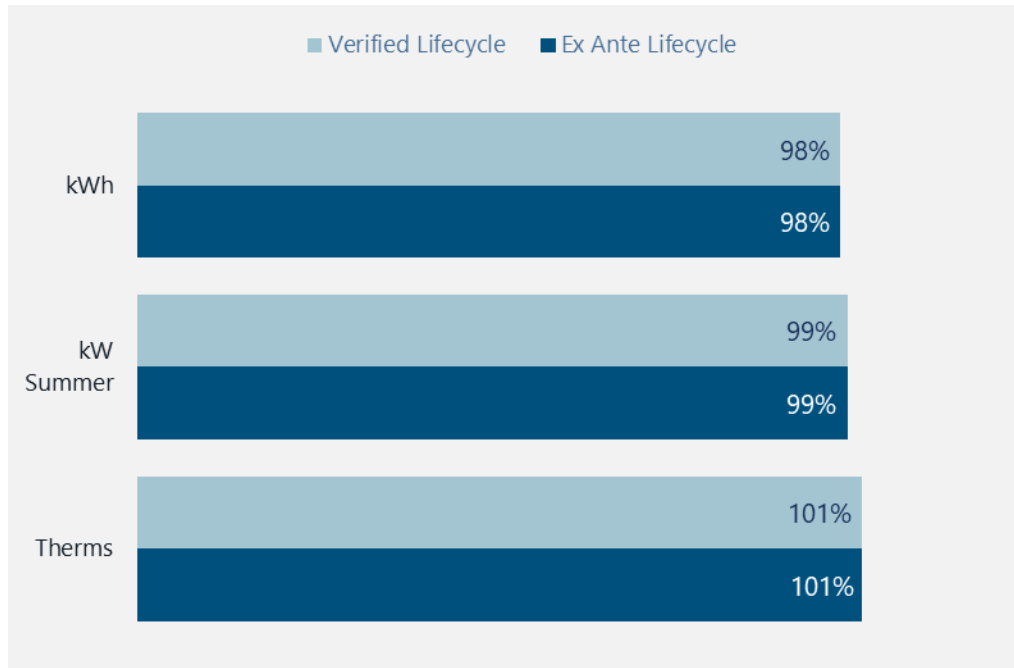


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9.1. Achievement Against Goals

As shown in Figure 66, in CY 2025, the Business and Industry Program achieved 98% of its electric energy savings goal, 99% of its summer peak demand savings goal, and 101% of its therm savings goal based on verified lifecycle savings at the program level.

Figure 66. CY 2025 Business and Industry Program Achievement of Gross Lifecycle Savings Goals



Note: 100% *ex ante* gross lifecycle savings reflect the implementer's contract goals for CY 2025. Verified gross lifecycle savings contribute to the administrator's portfolio-level goals. Winter kW goals were not established for CY 2025.

9.2. Impact Evaluation

This section presents the findings from the CY 2025 impact evaluation of the Business and Industry Program.

9.2.1. Impact Evaluation Methodology

The evaluation team designed its CY 2025 impact evaluation, measurement, and verification approach to integrate multiple perspectives into its assessment of program performance. The team used the following approaches to measure the impact of the Business and Industry Program:

- Tracking database review
- Engineering desk reviews
- Virtual verification site visits and interviews
- Engineering savings calculations

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Table 80 lists the specific sample sizes the team used for the impact evaluation of the Business and Industry Program. Additional details about these activities and their findings are discussed below.

Table 80. CY 2025 Business and Industry Impact Evaluation Activities and Sample Sizes

Offering	Total Measures	Impact Evaluation Sample		
		Desk Reviewed Measures	Virtually Verified Measures	% Sampled (by <i>Ex Ante</i> MMBtu savings)
C&I	6,327	47	24	0.6%
EDA/EDR	96	15	8	65.1%
Total	6,423	62	32	11.2%

Engineering Desk Reviews

The evaluation team reviewed all available project documentation in SPECTRUM for a sample of 62 measures offered through the CY 2025 Business and Industry Program. This review included an assessment of the savings calculations and methodology applied by the implementer. The team relied on the applicable TRMs and other relevant secondary sources as needed. Secondary sources included energy codes and standards, case studies, and energy efficiency program evaluations of comparable measures (based on geography, sector, measure application, and date of issue).

For prescriptive measures, the team used the Focus on Energy 2025 TRM and associated work papers as the primary sources to determine methodology and data in nearly all cases. For hybrid and custom measures, the team reviewed the SPECTRUM savings analysis workbooks and adjusted inputs and methodologies as necessary based on engineering judgment and project documentation.

To conduct the program's impact analysis, the evaluation team selected a representative sample of measures and then extrapolated the findings from the random sample to the larger population. In CY 2025, this process used purposive and proportional sampling by the following process:

- **Census sampling** selected the measures with the largest savings by offering (called census measures). The team used a percentage distribution analysis to determine the savings threshold, as it varied by offering. The census sample included most measures larger than 5% of each offering's MMBtu lifecycle savings. Because these measures were sampled with certainty (100% of the eligible highest saving measures were sampled), the team did not extrapolate the results to the offering's population.
- **Random sampling** selected measures from the offering's measure population (called randomly sampled measures). The team stratified the population by reported savings, fuel type, and, sometimes, measure type to ensure the overall representativeness of the selected sample. The team extrapolated the cumulative realization rate of randomly sampled measures to the remainder of the offering's population.

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Virtual Verification Site Visits

The evaluation team conducted 32 virtual verification site visits, including interviews with the site contact. These site visits were conducted for sampled measures where the savings impact was high, the measure type was hybrid or custom, or when there were outstanding questions that required clarification to complete the evaluation of the measure. During the site visits, the team verified the type and quantity of installed equipment, determined how the equipment is controlled, and documented operating hours. The team then verified the savings calculation input parameters based on operational and occupancy schedules, reported and observed setpoints, trend data, utility data, and any other relevant details identified before contact with the site.

9.2.2. Verified Gross Savings Results for the Business and Industry Program

Table 81 lists the first-year and lifecycle realization rates for the CY 2025 Business and Industry Program by offering.

Table 82 lists verified first-year and lifecycle savings by offering. The sampled projects represent 11% of the program lifecycle MMBtu savings. Overall, the program achieved a first-year evaluated realization rate of 100%, weighted by total energy savings (MMBtu). Note that, at the measure level, there was variability in realization rates across fuel types. The team determined realization rates by strata, such as census and sample strata, and summed reported and verified savings to the offering level to arrive at savings and realization rates. Detailed findings for each offering, including factors affecting the realization rates, are discussed in the next section of this chapter.

Table 81. CY 2025 Business and Industry Program First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
C&I	100%	100%	100%	100%	100%	100%	100%	100%
EDA/EDR	100%	101%	100%	100%	100%	100%	100%	100%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Table 82. CY 2025 Business and Industry Program First-Year and Lifecycle Verified Energy Savings Summary

Offering	Verified First-Year Savings					Verified Lifecycle Savings		
	kWh	kW Summer	kW Winter	therms	MMBtu ^a	kWh	therms	MMBtu ^a
C&I	79,029,021	11,215	8,577	1,695,024	439,149	1,127,069,980	28,861,855	6,731,748
EDA/EDR	10,633,091	1,765	1,501	305,569	66,837	212,661,820	6,112,440	1,336,846
Total	89,662,112	12,979	10,078	2,000,593	505,986	1,339,731,800	34,974,295	8,068,594

^a Verified kWh and therm savings may not sum to verified MMBtu values due to conversion/rounding associated with measure-level application of realization rates.

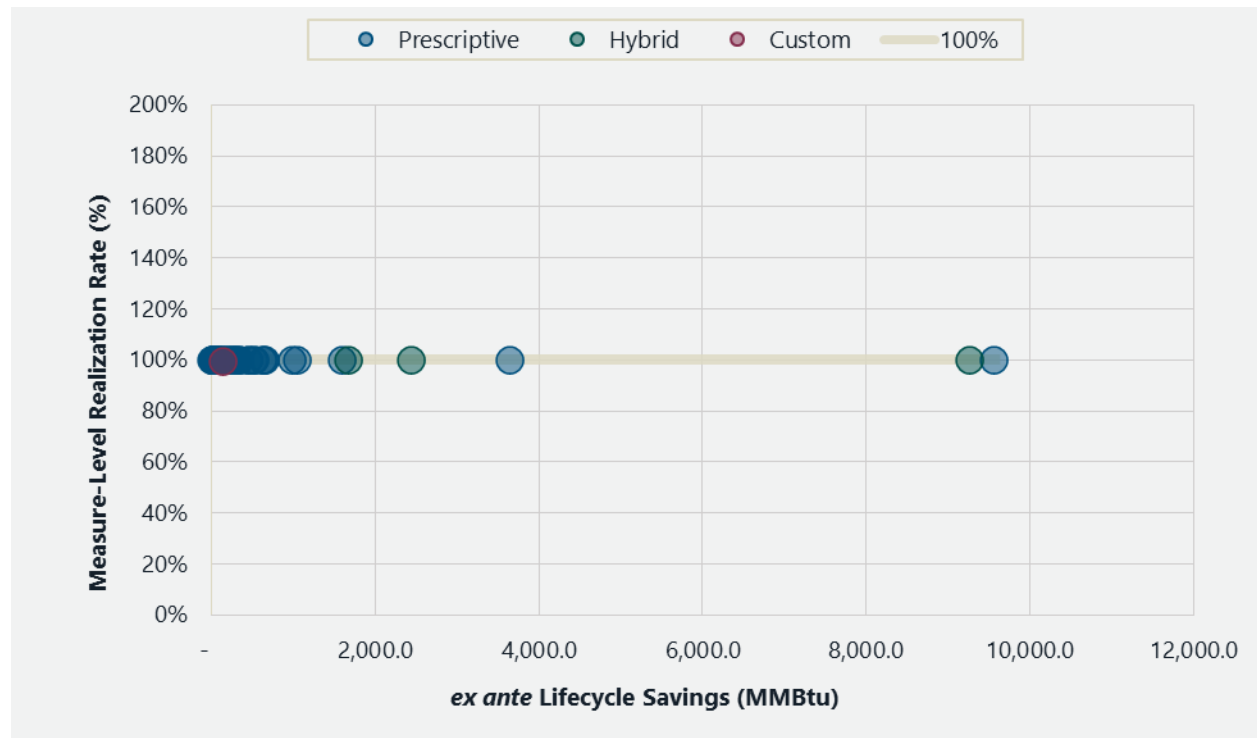
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Commercial and Industrial Offering: Verified Gross Savings Results

For the C&I offering, the evaluation team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The sampled projects represent less than 1% of the offering's lifecycle MMBtu savings. The offering had a gross lifecycle MMBtu realization rate of 100%.

Figure 67 illustrates the magnitude of and associated realization rates for reported MMBtu savings for the sampled projects.

Figure 67. CY 2025 C&I Offering Sampling Results



Generally, projects maintained $\pm 5\%$ of a 100% realization rate, with minor fluctuations. The following describes the main factor affecting the realization rate:

- The evaluation team adjusted one custom refrigeration measure to reflect the specification of the equipment demonstrated in the application data provided. The modifications to equipment wattage resulted in slightly fewer kWh savings realized (99.8%) and an overall lifecycle MMBtu realization rate that rounded to 100% for the project.

Table 83 lists the CY 2025 *ex ante* and verified gross savings by first-year and lifecycle gross savings for the C&I offering.

Table 83. CY 2025 C&I Offering *Ex Ante* and Verified Gross Savings

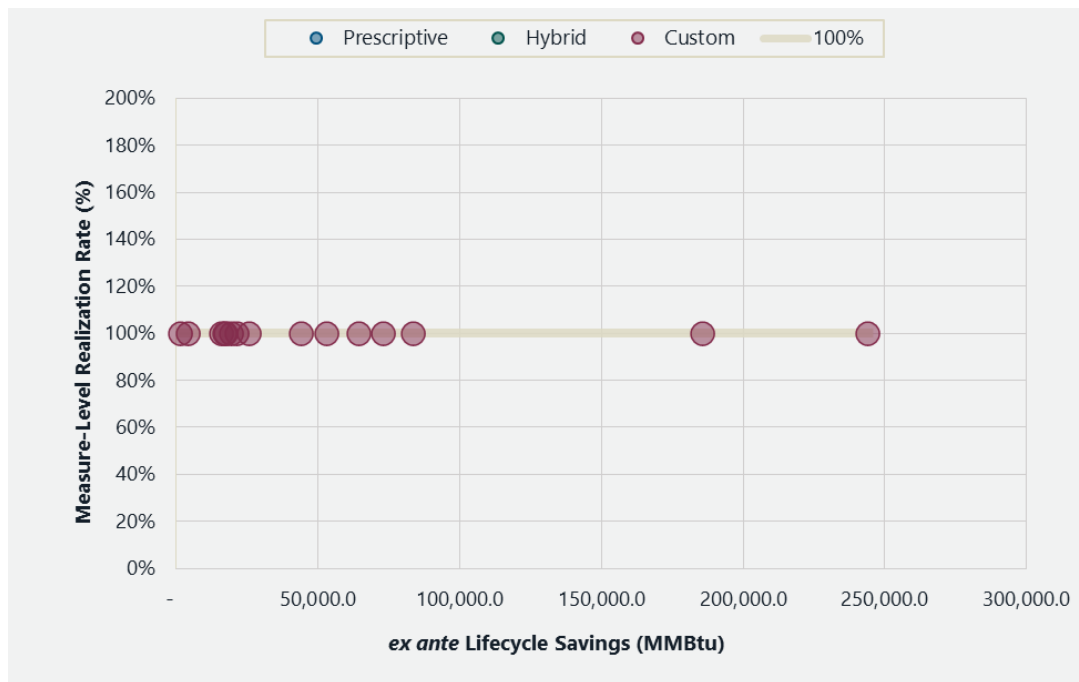
	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	79,029,021	11,215	8,577	1,695,024	79,029,021	11,215	8,577	1,695,024
Lifecycle Gross Savings	1,127,069,980	11,215	8,577	28,861,855	1,127,069,980	11,215	8,577	28,861,855

EDA/EDR Offering: Verified Gross Savings Results

For the EDA/EDR offering, the team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The EDA/EDR evaluation procedure involves reviewing the system information modeling (SIM) files, the NEO modeling results, the written report, the project specifications, and the data entered into the project tracking system, and looking for consistency across all documents. The evaluation team conducted interviews for a portion of the sampled EDA/EDR measures and compared any additional documentation collected from customers during interviews against the rest of the submitted documentation to ensure alignment of reported values. Where there were discrepancies or a lack of additional information, the evaluation team considered the ModelSim reports to be the final as-built and based the evaluated savings on that output.

The sampled projects represent 65% of EDA/EDR lifecycle MMBtu savings. The offering had a gross lifecycle MMBtu realization rate of 100%. Figure 68 illustrates the magnitude and associated realization rates for *ex ante* lifecycle MMBtu savings of the sampled projects.

Figure 68. CY 2025 EDA/EDR Offering Sample Results



The projects generally maintained within ±5% of a 100% realization rate across all savings types, with minor fluctuations. The main factors that affected the measure realization rates are as follows:

- For seven EDA measures, there were discrepancies between the verified Model Sim report, which is the direct output from the modeling platform (one project used NEO and one project used FileBuilder), the written verification report, and the *ex ante* value reported within the SPECTRUM database. The evaluation team modified the final savings values to reflect the ModelSim reports.
 - For all of these projects, the first-year and the lifecycle MMBtu realization rates are rounded to 100%.
 - For five of these projects, the kW summer peak demand realization rates ranged from 99% to 102%.

Table 84 lists the CY 2025 *ex ante* and verified gross savings by first-year and lifecycle gross savings for the EDA/EDR offering.

Table 84. CY 2025 EDA/EDR Offering *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	10,633,091	1,747	1,501	305,569	10,633,091	1,765	1,501	305,569
Lifecycle Gross Savings	212,661,820	1,747	1,501	6,112,440	212,661,820	1,765	1,501	6,112,440

9.2.3. Verified Net Savings Results for the Business and Industry Program

The evaluation team used CY 2023 participant survey results to assess net savings for the CY 2025 Business and Industry Program. To calculate the NTG for each offering in CY 2023, the team combined the self-reported freeridership and participant spillover results using the following equation:

$$NTG = 1 - \text{Freeridership Ratio} + \text{Participant Spillover Ratio}$$

Table 85 shows the CY 2023 NTG ratios applied to the CY 2025 Business and Industry Program. The 2023 evaluation report contains the full detailed analysis of NTG completed in CY 2023.¹⁹

Table 85. CY 2025 Business and Industry Program NTG Ratios by Offering

Offering	Freeridership	Spillover	NTG Ratio
C&I	23%	2%	79%
EDA/EDR	7%	0%	93%

¹⁹ Cadmus. May 17, 2024. *Focus on Energy Calendar Year 2023 Evaluation Report – Volume III Appendices. Appendix G. Net Savings Analysis*. Prepared for Focus on Energy. https://assets.focusonenergy.com/production/inline-files/Evaluation_CY_2023_Vol-III_Appendices_final.pdf

Table 86 shows the total lifecycle gross verified savings, lifecycle net savings, and final NTG ratios for the Business and Industry Program in CY 2025.

Table 86. CY 2025 Business and Industry Lifecycle Net Savings and NTG

Offering	Total Lifecycle Gross Verified Savings (MMBtu)	Total Lifecycle Net Savings (MMBtu)	NTG Ratio
C&I	6,731,748	5,318,081	79%
EDA/EDR	1,336,846	1,243,267	93%
Total	8,068,594	6,561,348	81%

9.3. Process Evaluation

This section discusses process evaluation activities conducted in CY 2025 related to the Business and Industry and all nonresidential programs.

9.3.1. Process Evaluation Methodology

The CY 2025 Business and Industry process evaluation assessed participant satisfaction and investigated prescriptive rebate submission trends. The team also explored nonresidential program participants' and trade allies' preferences for receiving program communications through surveys and in-depth interviews. Table 87 lists the data collection activities and sample sizes for all primary data collection.

Table 87. CY 2025 Business and Industry Program Process Evaluation Activities

Activity	CY 2025 Completes (n)
Program Documentation Review	✓
Ongoing Participant Satisfaction Surveys	101
Participant Surveys	80 Business and Industry, 25 Large Industrial
Trade Ally Interviews	25 across all nonresidential programs
Prescriptive Rebate Investigation and Interviews	3

Program Documentation Review

The evaluation team reviewed the Business and Industry Program's implementation and marketing plans to understand the program structure and how it was implemented in CY 2025. The team also reviewed miscellaneous documentation, like quarterly performance reports to the PSC from the program administrator, to understand program updates and progress in CY 2025.

Ongoing Participant Satisfaction Survey

Using contact information stored in SPECTRUM, the program administrator oversaw an ongoing web-based satisfaction survey of CY 2025 participants. There were two objectives for the satisfaction survey:

- Understand customer satisfaction on an ongoing basis and respond to any changes in satisfaction before the end of the annual reporting schedule
- Help to facilitate timely follow-up with customers to clarify and address service concerns

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A total of 101 Business and Industry Program participants responded to the CY 2025 survey. The survey covered several topics, including overall satisfaction, satisfaction with offering staff and trade allies, the likelihood of recommending Focus on Energy, and other feedback.

Data Center Market Research

The evaluation team conducted secondary market research to understand the data center market structure, trends, energy efficiency opportunities, the scale of those opportunities, and potential customer engagement strategies.²⁰ To contextualize the secondary research findings, the team conducted three interviews with energy efficiency program managers. For further details on the research approach and findings, please refer to the external report.

Investigative Analysis of Prescriptive Rebate Submissions

The evaluation team conducted an investigative analysis to explore the underlying causes of a perceived decline in prescriptive rebate submissions. The details of the methodologies and findings of this research are described in *Prescriptive Rebate Investigation* section.

Cross-Cutting Nonresidential Program Research

In CY 2025, the evaluation team conducted surveys and interviews that cut across Focus on Energy's nonresidential programs to explore the following research topics:

- **Participant Surveys.** The team surveyed recent Business and Industry and Large Industrial program participants to explore communication preferences such as timing, frequency, and medium of communication by customer segment. The details of the methodologies and findings of this research are described in the *Nonresidential Cross-Cutting Research* section of the report.
- **Trade Ally interviews.** The evaluation team interviewed a sample of trade allies across all programs to explore optimal timing, frequency, and medium of program communications. Interviews also collected feedback on prescriptive rebate activity and general program participation. The details of the methodologies and findings of this research are described in the *Nonresidential Cross-Cutting Research* section of this report.

9.3.2. Program Design and Delivery

The primary opportunity for customers to participate in the Business and Industry Program is through the custom and prescriptive incentives available through the C&I offering. This offering provides incentives for a broad range of energy-efficient prescriptive measures and custom projects. Customers can apply for incentives directly through Focus on Energy or their trade ally, with support from energy advisors, the implementer, and occasionally from their utility account representatives.

²⁰ Cadmus; Apex Analytics. Data Center Energy Efficiency Opportunities. January 21, 2026. Memorandum prepared for the Public Service Commission of Wisconsin and Focus on Energy.
https://assets.focusonenergy.com/production/docs/evaluation/Focus-on-Energy_Data-Center-Memorandum_1_21_2026.pdf

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Special Promotions and Incentives

In CY 2025, Focus on Energy offered the following bonuses and special offerings through the Business and Industry Program:

- **Trade Ally Prescriptive Bonus.** Launched in July 2023, this bonus was developed to encourage trade allies to promote the Focus on Energy program. In CY 2025, trade allies received a bonus equal to 15% of the customer incentive or \$30 (whichever was greater) for completed projects. Trade allies had to be registered to receive the bonus.
- **Custom Design Team Bonus.** Focus on Energy launched the custom design team bonus in January 2024 to reward Trade Allies for supporting long or complex preapprovals in custom projects and building a pipeline for business programs. In CY 2025, trade allies received a bonus that was 10% of the customer incentive, up to \$10,000, for completed projects. Trade allies had to complete an impact statement located in the custom workbook to receive the bonus.
- **Nonprofit Efficiency Accelerator.** Launched in October 2023, this offering was designed to assist nonprofits in implementing energy-saving measures by providing enhanced incentives beyond standard program rates. In CY 2025, nonprofits could apply for enhanced incentives through one of two paths: donation matching or Request for Proposals. The donation match provided a 100% match to an organization's fundraising efforts, up to \$25,000, and the Request for Proposal path allowed customers to request up to \$100,000, 50% of the project cost, or 15 times annual energy savings. The offering accepted applications through the end of CY 2024, with all projects required to be implemented by December 12, 2025. Eligible customers included any organization with 501(c)(3) tax-exempt status.
- **Compressed Air Energy Challenge.** Launched in April 2024, this offering was designed to offset the costs of servicing smaller industrial facilities by incentivizing compressed air leak surveys. Customers can receive incentives per leak repaired through on-the-spot repairs, rather than the standard incentive calculated per compressor horsepower. In CY 2025, customers who completed either a standard leak survey and repair or on-the-spot repair received a coupon for an additional 20% incentive on their next compressed air retrofit project.

Program Updates

In CY 2025, Focus on Energy made several updates to the Business and Industry Program's incentive catalogs to improve navigation, including presenting new construction measures alongside retrofit measures in the same catalog tables.

Focus on Energy also increased prescriptive incentives across multiple measure categories, including HVAC (boilers, heat pumps, variable-frequency drives [VFDs], and building envelope measures), lighting (LED fixtures, high bay/low bay, controls, and T-LED lamps), commercial refrigeration (evaporator fan motors and LED case lighting), process systems (compressed air, steam traps, and VFDs), and agribusiness measures. New lighting measures were also added, including fixtures with integrated Luminaire Level Lighting Controls and a suite of Advanced Lighting Controls and wattage reduction measures to replace the discontinued Comprehensive Lighting Solutions offering.

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9.3.3. Prescriptive Rebate Investigation

To better understand prescriptive rebate trends, the evaluation team analyzed data from the Business and Industry program applications. The analysis examined patterns in application volume, savings, incentive costs, and contractor participation to assess program performance and identify areas for further inquiry. The following section presents some key findings from this analysis.

High-Level Trends

The evaluation team analyzed Business and Industry Program application data, specifically comparing the number of applications, MMBtu, and incentive paid in Q1–Q2 2024 and Q1–Q2 2025. This timeframe was selected due to a reported downturn in applications in the first half of 2025, following an increase between 2023 and 2024. Comparisons beyond this were not pursued, as the analysis could be complicated by COVID-19 recovery, changes in program structure, and broader macroeconomic factors.

Although the number of applications and cost per MMBtu declined in the first half of 2025, total program savings increased slightly compared to the same period in 2024. Higher HVAC savings per measure, combined with a greater number of Boilers & Burners and Lighting measures per project, offset the decrease in application volume. Savings per measure decreased across most measure groups, except for HVAC, suggesting that the overall increase in savings was driven by project composition (i.e., the number of measures per application) rather than individual measure performance. Lighting and Boilers & Burners accounted for the majority of program savings in both years, with each measure group's share of annual savings remaining relatively constant year-over-year. Despite increased incentive rates introduced going into 2025, average application cost rose while overall application counts did not, and cost per MMBtu increased across nearly all measure groups as a result.

Contractor Analysis

The evaluation team also examined participation trends among contractors active in the program. In the first half of 2025, 46% of contractors that participated in the first half of 2024 experienced a decrease in application volume. Contractors with decreased participation were more likely to have never received a trade ally bonus in either year (55%) than 37% of contractors whose participation increased or remained stable. Contractors in the two largest measure groups—Boilers & Burners and Lighting—were roughly evenly split between those who increased and those who decreased activity in 2025. Overall, while applications declined year-over-year, the variation was modest, and participation among core contractor groups suggests that program performance remained stable between 2024 and 2025.

9.3.4. Ongoing Participant Satisfaction Survey

Throughout CY 2025, the administrator invited all Business and Industry participants with valid email addresses to take a web-based satisfaction survey. The following sections present survey results from the 101 participants who responded.

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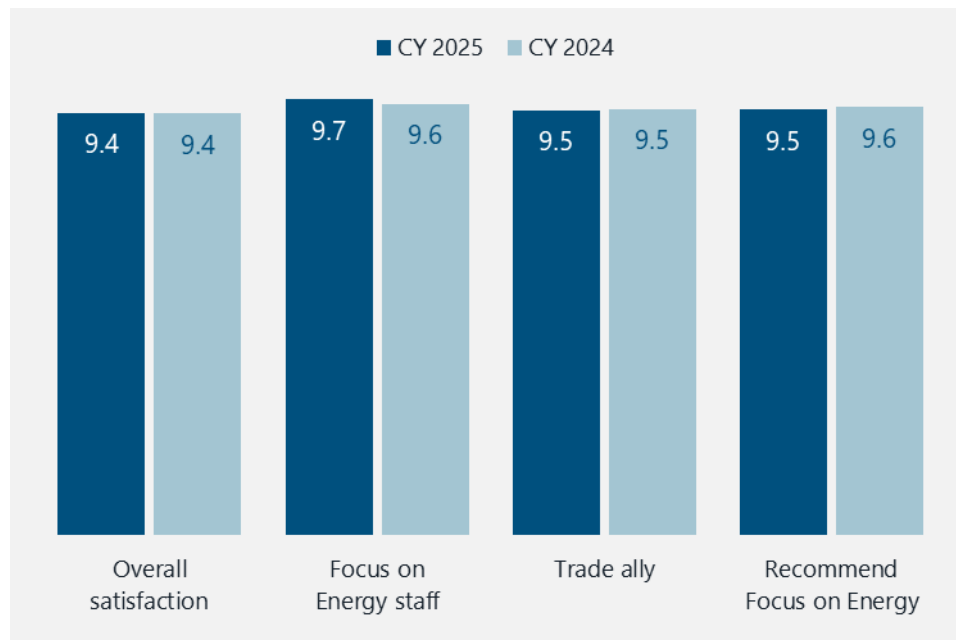
Awareness

The participant satisfaction survey asked respondents how they learned about the Business and Industry Program. In CY 2025, most respondents said they learned about it from trade allies (41%, n=91), followed by Focus on Energy advisors and staff (19%) and previous experience with offerings (16%).

Participant Satisfaction

The survey asked participants to rate their satisfaction with the program and the likelihood of recommending Focus on Energy on a scale of 0 to 10, where 10 indicated the highest satisfaction or likelihood and 0 the lowest. As Figure 69 shows, CY 2025 respondents gave the program an average overall satisfaction score of 9.4, unchanged from 9.4 in CY 2024. In CY 2025, respondents gave high ratings for all components of the program; these ratings were all statistically equivalent to the corresponding CY 2024 ratings.²¹

Figure 69. Business and Industry Participant Satisfaction and Likelihood Ratings



Source: Business and Industry Program Participant Satisfaction Survey Questions. “Overall, how satisfied are you with your most recent experience with Focus on Energy?” (CY 2025 n=101; CY 2024 n=95). “How satisfied are you with the Energy Advisor or Focus on Energy staff member who assisted you with your project?” (CY 2025 n=85; CY 2024 n=70). “How satisfied are you with the contractor(s) that you worked with on this project?” (CY 2025 n=82; CY 2024 n=69). “How likely are you to recommend Focus on Energy to others?” (CY 2025 n=100; CY 2024 n=92). There are no statistically significant differences between CY 2025 and CY 2024 ratings.

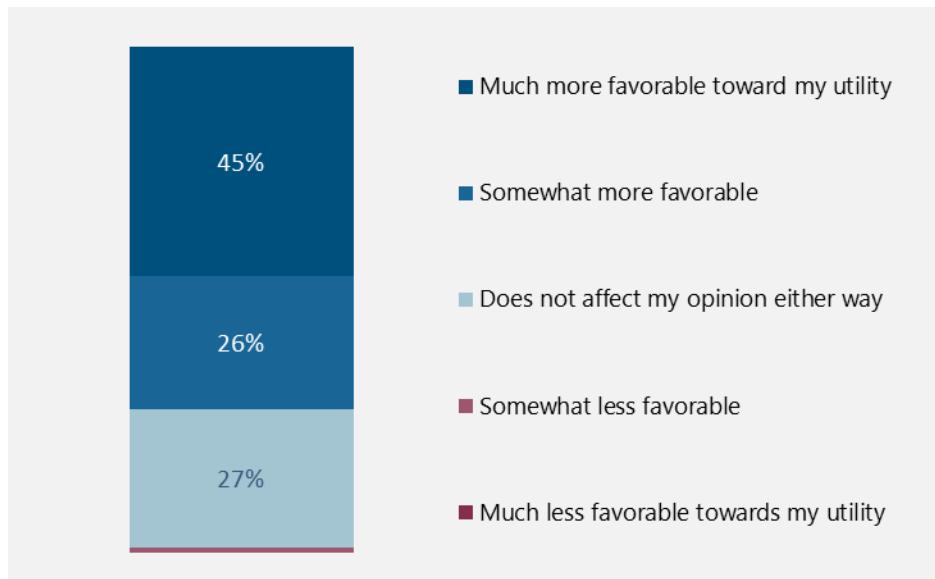
²¹ The number of participants who completed a survey does not always match the number of responses for each question, as some participants skipped or did not know answers to questions.

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Using the survey data, the evaluation team calculated an NPS based on customers' likelihood to recommend Focus on Energy. The NPS is expressed as an absolute number between -100 and +100, representing the difference between the percentage of promoters (respondents rating 9 or 10) and detractors (respondents rating 0 to 6). High NPS scores (+70 or higher) are theoretically predictive of customer behaviors, such as participating in another offering, implementing additional energy improvements, and referring Focus on Energy offerings to others. The Business and Industry Program's NPS was +88 for CY 2025, the same as +88 for CY 2024.

Respondents were asked whether they were aware that the Business and Industry Program was offered in partnership with their local utility before receiving the satisfaction survey. Seventy-five percent (n=101) were aware in CY 2025, similar to 73% (n=95) in CY 2024. Respondents were also asked whether Focus on Energy offerings affected their opinion of their utilities. As Figure 70 shows, 71% reported that their opinion had become *much more favorable* or *somewhat more favorable*, while one respondent reported that their opinion had become *somewhat less favorable*, and 27% said their opinion of their utility was not affected. This result was consistent with 69% reporting a *much more favorable* or *somewhat more favorable* opinion of their utility in CY 2024.

Figure 70. Business and Industry Participants' Opinions of Utilities

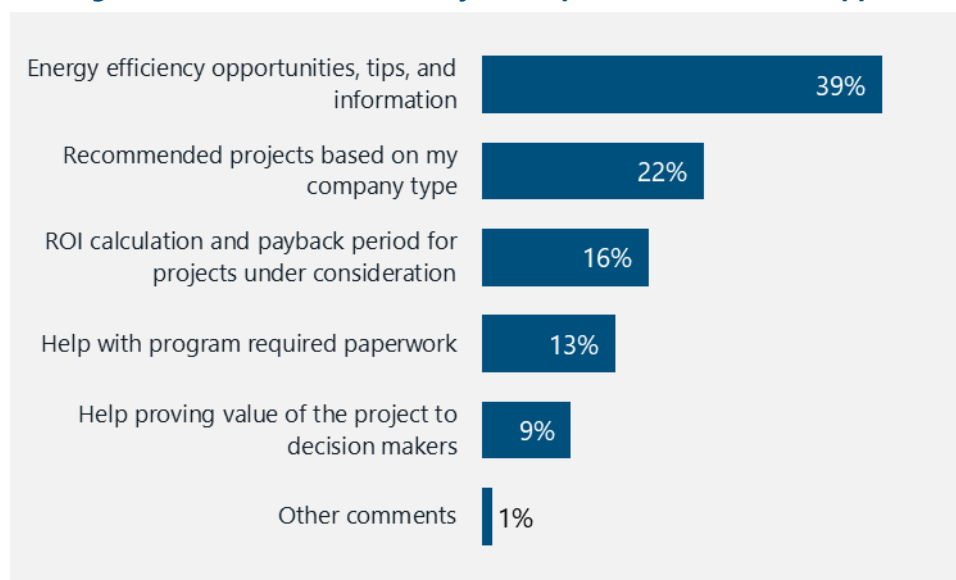


Source: Business and Industry Participant Satisfaction Survey Question: "How have these offerings affected your opinion of your energy utility, if at all?" (n=95). No responses were received for the "much less favorable" option. Percentages under 2% are not labeled in the figure.

Survey respondents identified how Focus on Energy could best support their organization with future projects. The most frequent response from CY 2025 participants was energy efficiency opportunities, tips, and information (39%), which was also the top response in CY 2024. The second most common suggestion in CY 2025 was recommending projects based on company type (22%), which was also the second most mentioned in the prior year.

Figure 71 shows respondents' most valued support for moving projects forward.

Figure 71. Business and Industry Participants' Most Valued Support



Source: Business and Industry Participant Satisfaction Survey Question: "Aside from providing project incentive dollars, how can Focus on Energy best support your organization going forward?" (n=92)

Participant Feedback and Suggestions for Improvement

The survey asked participants whether they had any comments or suggestions to improve the program. Of the 101 participants who responded to the survey, 25% provided open-ended feedback, which the evaluation team coded into 30 mentions. Of these mentions, 24 were positive or complimentary (80%), and six suggested improvements (20%). Most of the positive comments were complimentary toward trade allies and Focus on Energy staff who assisted with their project (eight mentions) or reflected a generally positive experience (nine mentions), while the remainder highlighted the ease and convenience of the process (three mentions), energy and cost savings (three mentions), and satisfaction with the equipment installed (one mention).

There were only six suggested improvements from respondents in CY 2025, and three involved Focus on Energy staff:

- One suggested improving outreach and communications from staff regarding incentive applications.
- One suggested assigning Focus staff to assist with projects by company rather than by program, and one requested more on-site visits from staff.
- Among the remaining suggestions, two suggested reducing delays in the approval of incentives, and one suggested broadening eligibility requirements to include more non-standard projects.

In CY 2025, the satisfaction survey included an open-ended question soliciting comments on participants' experience with trade allies. Most of this feedback (40 of 46 comments) was very positive and in keeping with respondents' high satisfaction ratings for trade allies. Five of the six remaining comments with

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suggestions for improvement focused on poor and delayed communication from trade allies, while the sixth comment suggested that installers provide better training on operating the equipment they install. Two of these suggestions for improvement also reported issues with the installation itself. Only three respondents gave a rating of 7 or lower for satisfaction with trade allies in CY 2025, all of whom were among those making suggestions for improvement.

9.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a DSM offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III includes a description of the TRC test.

Table 88 lists the CY 2025 incentive costs for the Business and Industry Program.

Table 88. CY 2025 Business and Industry Incentive Costs

Offering	Incentive Costs
C&I	\$7,174,074
EDA/EDR	\$1,141,350
Total	\$8,315,424

The evaluation team found that the CY 2025 Business and Industry Program was cost-effective (3.28). Table 89 lists the evaluated costs and benefits.

Table 89. CY 2025 Business and Industry Costs and Benefits

Cost and Benefit Category	Total
Costs	
Administration Costs	\$354,132
Delivery Costs	\$5,290,263
Incremental Measure Costs	\$29,231,819
Total Non-Incentive Costs	\$34,876,214
Benefits	
Electricity Benefits (kWh)	\$23,154,782
Capacity Benefits (kW)	\$26,591,361
T&D Benefits (kW)	\$7,633,947
Gas Benefits	\$12,938,664
Emissions Benefits	\$43,977,149
Total TRC Benefits	\$114,295,904
Net TRC Benefits	\$79,419,690
TRC Benefit/Cost Ratio	3.28

9.5. Outcomes

The evaluation team identified the following outcomes and recommendations for improving the Business and Industry Program based on the CY 2025 program evaluation activities. Additional outcomes and recommendations from the cross-cutting process evaluation activities can be found in discussions about those specific research activities, referenced in the *Nonresidential Cross-Cutting Research* section.

Outcome 1. While the number of applications declined in the first half of 2025 relative to the same period in 2024, program savings are up slightly. Savings per measure decreased across most measure groups, except for HVAC, suggesting that the overall increase in savings was driven by project composition (i.e., the number of measures per application) rather than individual measure performance. Lighting and Boilers & Burners accounted for the majority of program savings in both years, with each measure group's share of annual savings remaining relatively constant year-over-year. Part of the decrease in Boilers & Burners prescriptive savings may reflect a mid-2024 shift of smaller boiler measures to the Instant Discount Program rather than a decline in activity. Overall, the decline in prescriptive applications occurred among broader economic uncertainty related to tariffs imposed in early 2025, which may have contributed to project delays.

Outcome 2. Slightly less than half of the contractors that participated in the first half of 2024 experienced a decrease in participation (by application count) in the first half of 2025. Contractors who reduced their participation were less likely to have received a trade ally bonus in either year. Contractors in the two largest measure groups, Boilers/Burners and Lighting, were split regarding whether their participation increased or decreased in 2025.

Outcome 3. Reported *ex ante* savings were highly accurate. First-year and annual MMBtu energy realization rates were 100% for the Business and Industry Program in CY 2025, indicating high accuracy in quantifying estimated energy savings.

Outcome 4. Business and Industry participant satisfaction remained high in CY 2025. Participants gave the program an overall satisfaction score of 9.4, which was the same as in CY 2024. This satisfaction is supported by the high NPS of +88 for CY 2025, suggesting that participants are likely to recommend Focus on Energy to others.

10. Large Industrial Program

Through the Large Industrial Program, Focus on Energy offers technical assistance and financial incentives for large industrial customers who install energy-efficient or renewable energy measures.

The Large Industrial Program consists of two primary offerings:

- **Large Industrial.** This offering supports industrial customers whose average monthly demand exceeds 1,000 kW of electricity or 100,000 therms of natural gas per month and whose combined utility bills were at least \$60,000 in any month of the preceding year. The offering provides prescriptive and custom incentives for installing energy-efficient measures in existing buildings or new construction projects.
 - *Prescriptive rebates* are offered for standard equipment installations or replacements in an existing building or new construction.
 - *Custom incentives* are offered for nonstandard equipment installations or replacements in existing buildings or new construction. Custom incentives are also available for non-solar PV renewable technologies, such as biogas, biomass, solar thermal, hydroelectric, and wind technologies.
- **Energy Design Assistance/Energy Design Review (EDA/EDR).** This offering is available for new construction, major renovation, and additional projects over 5,000 square feet. It provides a whole-building energy analysis of multiple design options and incentives based on the building's overall modeled energy savings. This offering is also available through the Business and Industry, Schools and Government, and Multifamily programs.

The program administrator is APTIM. The program implementer, Leidos, oversees program management and delivery, and its subcontractor—CleanTech Partners—provides subject-matter expertise. Willdan, the EDA/EDR implementer, conducts building modeling to support the EDA/EDR offering. With support from the administrator, the implementers' energy advisors promote and deliver the Large Industrial Program to customers and trade allies.

In addition to the Large Industrial and EDA/EDR offerings, the program provides secondary opportunities for participation:

- **Annual Planning Incentive (API) / Capital Planning Incentive (CPI) (January 2023 – Present):** Focus on Energy designed the API to support business customers in annual energy planning by facilitating meetings with an energy adviser to identify energy efficiency projects planned for completion in the upcoming calendar year. Energy advisors worked with customers to develop a workbook that details upcoming projects, return on investment, potential energy savings, and estimated completion dates. The program targeted identifying energy savings of at least 1% of the facility's annual energy spend. Customers submitted the annual planning workbook as part of the API application and, upon approval, received a \$2,500 incentive, limited to one incentive per year per site. Focus on Energy discontinued the API at the end of July 2025 and transitioned the offering exclusively to the CPI. The CPI simplifies the offering, with customers continuing to meet with energy advisors to create a list of capital projects; however, CPI introduced a requirement that the plant manager or equivalent authorized facility management personnel review and sign

off on the project list. The capital projects list is a dedicated section in the CPI application that requires the customer's signature prior to submission. CPI incentive remains \$2,500 and continues to be limited to one incentive per year per site.

- **Building Performance Optimization (previously Whole-Building Tune-Up) (June 2022-Present):** The whole-building tune-up allows customers to adjust common control systems without requiring a facility audit or verification data. The tune-up offers 14 optimization measures for heating, cooling, ventilation, and hot water systems, implemented on the same day by a trade ally. The trade ally then submits the application online via Formstack. In CY 2025, customers could receive up to \$1,850 in incentives: \$750 for the first three implemented measures and \$100 per additional measure. Customers could also receive incentives for the same measure once every three years. Trade allies could receive a \$200 incentive to complete a building health report.
- **Industrial Staffing Incentive (April 2023-December 2024):** This opportunity was available to customers in need of financial support to justify or offset staffing costs required to complete energy-saving projects. The incentive was based on the total value of staff time or third-party subcontractor time required to manage a qualifying energy efficiency project. Qualifying projects were identified via a project list submitted at the time of application to the program. The staffing incentive allowed customers to request up to \$100,000 for projects completed from April 2023 through December 2025 and was limited to 50% of the expected annual cost savings for each project included in the proposed project list. In CY 2025, the offering ended and stopped accepting applications. The remaining projects were allowed to be completed by the end of 2025.
- **Project Assessment Incentive (PAI) (2009-Present):** The PAI offers cost-sharing for the development or engineering of complex energy-saving projects where energy savings are not immediately known. In CY 2025, the incentive paid 50% of the assessment cost or 20% of the estimated annual energy cost savings (whichever is smaller), up to \$15,000. To receive this incentive, customers must obtain pre-approval from Focus on Energy prior to initiating the assessment. As of CY 2025, PAIs were available to all customers in the Large Industrial market. In CY 2024, Focus on Energy expanded the offering to include biogas and biomass systems, which had previously been supported through a separate feasibility study.
- **Retro-commissioning (January 2022-Present):** Retro-commissioning is the process of improving the performance and energy efficiency of building systems and equipment via low- and no-cost modifications to building controls and protocols. Incentives are based on square footage, with a base rate and additional incentives tied to reductions in energy use intensity. In CY 2025, incentives could cover up to 75% of the project cost, up to \$100,000 per project. The opportunity is available to all customers in the large industrial market segment, but it is designed for properties older than five years and larger than 5,000 square feet.
- **Request for Proposals (June 2024-Present):** The RFP offering was designed to provide business customers with an opportunity to receive additional financial support for energy efficiency projects that exceed standard program incentive rates, enabling larger natural gas or electric savings projects. It is available to all large industrial customers in Focus on Energy's service territory. The RFP offering provides incentives beyond the normal program limits, up to 100% of the project cost, with offer acceptance determined by a scoring system based on available funds.

Incentive amounts are determined through a bid process that allows both the customer and program to counteroffer if needed. The first round of RFPs occurred in CY 2024. The second round ran from January 24, 2025, to April 15, 2025. Projects funded in the second round are expected to be completed by November 30, 2026.

- Strategic Energy Management (January 2020-Present):** Strategic energy management provides participants with guidance and technical assistance to advance energy management capabilities and establish a continuous improvement process, resulting in low- and no-cost operational energy improvements. This opportunity is available to all customers in the Large Industrial market. In CY 2025, customers could receive incentives of \$0.02 per kWh and \$0.20 per therm saved, up to \$50,000 per site per year.
- Summer Internship (May 2025 – Present):** The Large Industrial Program accepted applications for the 2025 Summer Energy Efficiency Internship Program. The program offered participating customers financial support and training throughout the summer. Customers could receive up to \$5,000 towards the employment of each intern, for up to 10 customer sites. Interns were required to be available for at least an eight-week period during the summer of 2025 and to attend a kickoff meeting with Focus on Energy, as well as regularly scheduled progress check-in calls. Intern activities could include data collection to support energy savings, supporting the development of an energy management plan, providing ongoing support of energy team meetings, and helping to move energy projects forward.

Table 90 summarizes the performance and savings impacts of the Large Industrial Program in CY 2025.

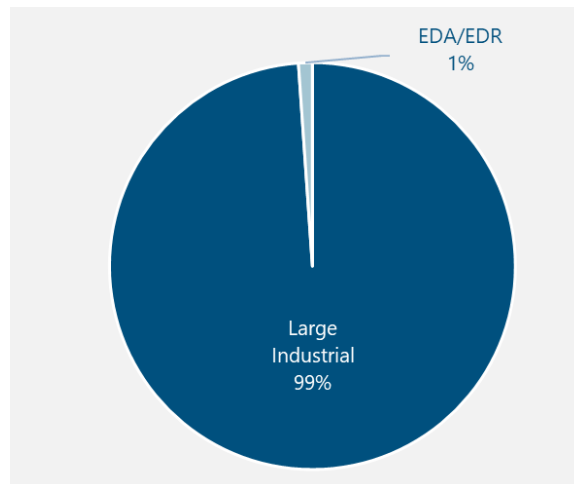
Table 90. CY 2025 Large Industrial Program Summary

Item	Units	CY 2025
Incentive Spending	\$	\$8,966,458
Participation	Number of Participants	233
Verified Gross Lifecycle Savings	kWh	1,573,778,855
	kW Summer	13,338
	kW Winter	12,778
	therms	103,881,986
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%
Annual NTG Ratio	% (MMBtu)	92%
Net Annual Savings	kWh	100,112,691
	kW Summer	12,277
	kW Winter	11,759
	therms	6,284,462
Net Lifecycle Savings	MMBtu	14,499,046
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	4.54

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Figure 72 shows the proportion of Large Industrial Program savings by offering. In CY 2025, the Large Industrial offering contributed 99% of the gross lifecycle MMBtu savings to the program, and the EDA/EDR offering contributed 1%.

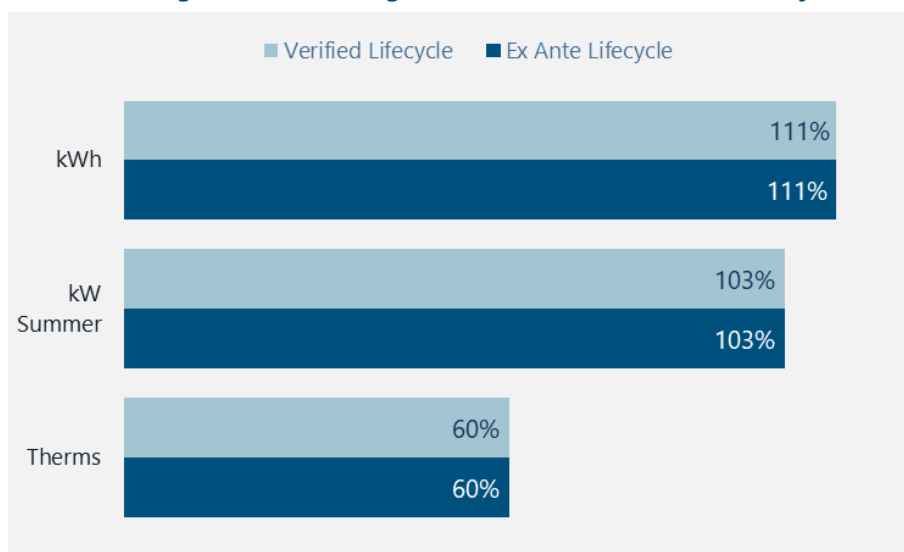
Figure 72. Large Industrial Program Achievement of Gross Lifecycle Savings by Offering



10.1. Achievement Against Goals

As shown in Figure 73, in CY 2025, the Large Industrial Program achieved 111% of its electric energy savings goal, 103% of its summer peak demand savings goal, and 60% of its therm savings goal based on verified lifecycle savings at the program level.

Figure 73. CY 2025 Large Industrial Program Achievement of Gross Lifecycle Savings Goals



100% *ex ante* gross lifecycle savings reflect the implementer's contract goals for CY 2025. Verified gross lifecycle savings contribute to the administrator's portfolio-level goals. Winter kW goals were not established for CY 2025.

10.2. Impact Evaluation

This section presents the findings from the CY 2025 impact evaluation of the Large Industrial Program.

10.2.1. Impact Evaluation Methodology

The evaluation team designed its CY 2025 impact evaluation, measurement, and verification approach to integrate multiple perspectives into its assessment of program performance. The team used the following approaches to measure the impact of the Large Industrial Program:

- Tracking database review
- Engineering desk reviews
- Virtual verification site visits and interviews
- Engineering savings calculations

Table 91 lists the specific data collection activities and sample sizes used in the evaluation. Additional details about these activities and their findings can be found in the offering-specific discussions below.

Table 91. CY 2025 Large Industrial Impact Evaluation Activities and Sample Sizes

Offering	Total Measures	Impact Evaluation Sample		
		Desk Reviewed Measures	Virtually Verified Measures	% Sampled (by <i>Ex Ante</i> MMBtu savings)
Large Industrial	1,714	54	27	29%
EDA/EDR	14	4	2	100%
Total	1,728	58	29	29%

Engineering Desk Reviews

The evaluation team reviewed all available project documentation in SPECTRUM for a sample of 58 measures offered through the CY 2025 Large Industrial Program. This review included an assessment of the implementer’s savings calculations and methodology. The team relied on the applicable TRMs and other relevant secondary sources as needed. Secondary sources included energy codes and standards, case studies, and energy efficiency program evaluations of comparable measures (based on geography, sector, measure application, and date of issue).

For prescriptive measures, the team used the Focus on Energy 2025 TRM and associated work papers as the primary sources to determine methodology and data in nearly all cases. For hybrid and custom measures, the team reviewed the SPECTRUM savings analysis workbooks and adjusted inputs and methodologies as necessary based on engineering judgment and project documentation.

To conduct the impact analysis of the offerings, the evaluation team selected a representative sample of measures and then extrapolated the findings from the random sample to the larger population. In CY 2025, this process used purposive and proportional sampling by the following process:

- **Census sampling** selected the measures with the largest savings by offering (called census measures). The team used a percentage distribution analysis to determine the savings threshold,

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as it varied by offering. The census sample included most measures larger than 5% of each offering’s lifecycle MMBtu savings. Because these measures were sampled with certainty (100% of the eligible highest saving measures were sampled), the team did not extrapolate the results to the offering population.

- **Random sampling** randomly selected measures from the offering’s population of measures (called randomly sampled measures). The team stratified the population by reported savings, fuel type, and, sometimes, measure type to ensure the overall representativeness of the selected sample. The team extrapolated the cumulative realization rate of randomly sampled measures by offering to the remainder of the offering population.

Virtual Verification Site Visits

The evaluation team conducted 29 virtual verification site visits, including interviews with the site contact. These site visits were conducted for sampled measures where the savings impact was high, the measure type was hybrid or custom, or there were outstanding questions that required clarification to complete the evaluation of the measure. Evaluation staff verified the type and quantity of equipment installed, determined how the installed equipment is controlled, and documented operating hours. The team then verified the savings calculation input parameters based on operational and occupancy schedules, reported and observed setpoints, trend data, utility data, and any other relevant details identified before contact with the site.

10.2.2. Verified Gross Savings Results for the Large Industrial Program

Table 92 lists the first-year and lifecycle realization rates for the CY 2025 Large Industrial Program. Table 93 lists verified first-year and lifecycle savings by offering. The sampled projects represent 29% of the Large Industrial Program lifecycle MMBtu savings. Overall, the program achieved a first-year evaluated realization rate of 100%, weighted by total energy savings (MMBtu). At the measure level there was variability between fuel types in terms of the realization rates. The team determined realization rates by strata, such as census and sample strata, and summed reported and verified savings at the offering level to arrive at savings and realization rates. Detailed findings for each offering, including factors affecting the realization rates, are discussed in the next section of this chapter.

Table 92. CY 2025 Large Industrial Program First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Large Industrial	100%	100%	100%	99%	100%	100%	99%	100%
EDA/EDR	100%	100%	100%	98%	100%	100%	98%	100%
Total	100%	100%	100%	99%	100%	100%	99%	100%

Table 93. CY 2025 Large Industrial Program First-Year and Lifecycle Verified Energy Savings Summary

Offering	Verified First-Year Savings					Verified Lifecycle Savings		
	kWh	kW Summer	kW Winter	therms	MMBtu ^a	kWh	therms	MMBtu ^a
Large Industrial	106,336,592	12,806	12,451	6,827,220	1,045,542	1,524,681,515	103,808,446	15,583,058
EDA/EDR	2,454,867	533	328	3,677	8,744	49,097,340	73,539	174,874
Total	108,791,459	13,338	12,778	6,830,897	1,054,286	1,573,778,855	103,881,986	15,757,932

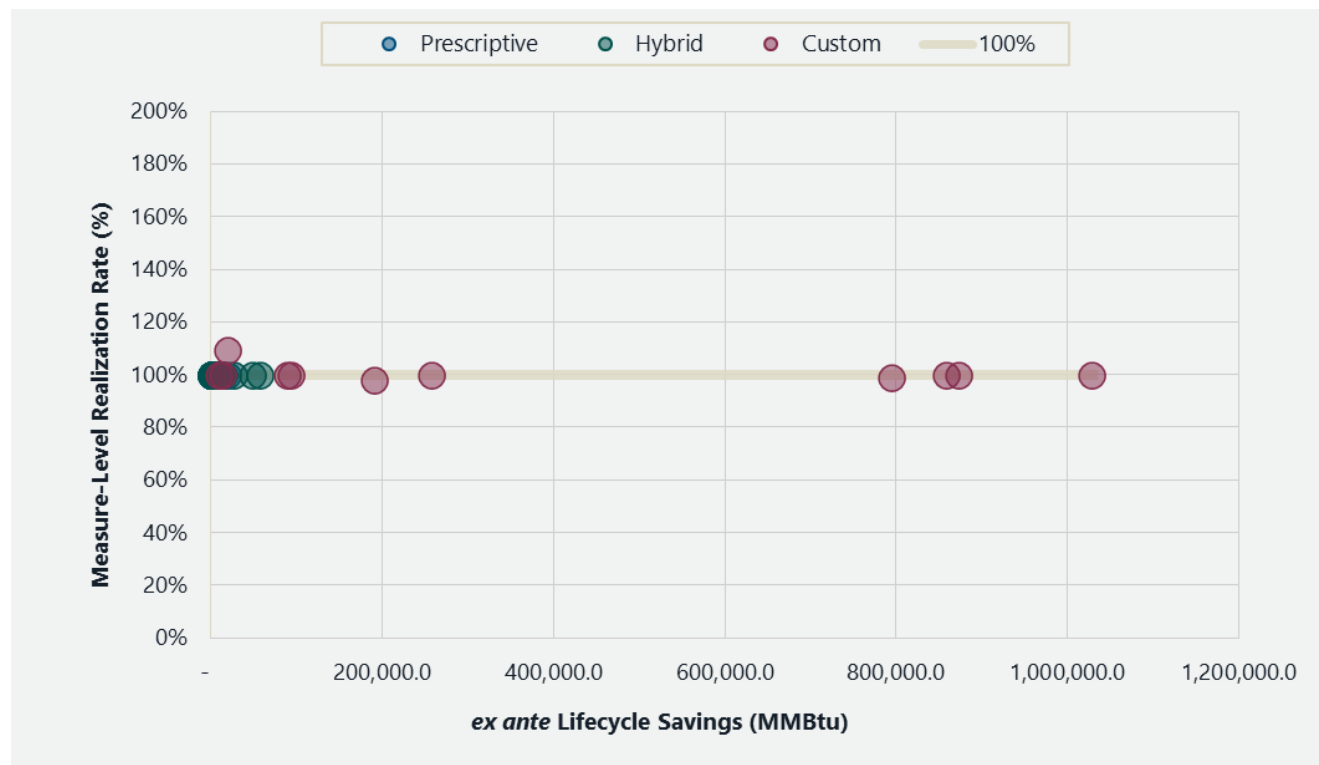
^a Verified kWh and therm savings may not sum to verified MMBtu values due to conversion/rounding associated with measure-level application of realization rates.

Large Industrial Offering: Verified Gross Savings Results

For the Large Industrial offering, the evaluation team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The sampled projects represent 29% of the offering’s lifecycle MMBtu savings. The offering had a gross lifecycle MMBtu realization rate of 100%.

Figure 74 illustrates the magnitude and associated realization rates for *ex ante* lifecycle MMBtu savings for the sampled projects.

Figure 74. CY 2025 Large Industrial Offering Sampling Results



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Some of the verified savings calculations deviated from *ex ante* savings. The following section describes the main factors affecting the realization rates:

- For one hybrid measure, there were very slight rounding errors in the outputs of *ex ante* calculations. Modifications in *ex post* resulted in MMBTU realization rates of 100% for the measure.
- For one prescriptive measure, the 2024 version of the Focus on Energy TRM was utilized for *ex ante* calculations, resulting in slightly different deemed savings values utilized. *Ex post* calculations reference the 2025 TRM for published deemed savings values. Modifications in *ex post* resulted in MMBTU realization rates of 100% for the measure.
- One census sampled custom measure *ex ante* calculation referenced steam table enthalpies different from what was reported in the project documentation. *Ex post* calculations reference the final steam table values reported in the post-implementation project documentation to derive savings. Modifications to the calculation inputs resulted in slightly reduced first-year kWh and therm savings, but the project achieved 100% lifecycle MMBtu realization rate after rounding.
- One census sampled custom measure *ex ante* calculation referenced pre-implementation enthalpy values rather than the post-implementation enthalpy value reported in the project documentation. *Ex post* calculations reference the final post-implementation project documentation to derive savings. Modifications made to the calculation inputs resulted in slightly reduced therm savings and a greater kWh penalty. The project achieved a lifecycle MMBtu realization rate of 99%.
- One randomly sampled custom measure *ex ante* calculation referenced average river temperature values different from what was reported in the project documentation. *Ex post* calculations reference the average river temperature values reported in the post-implementation project documentation to derive savings. Modifications to the calculation input resulted in slightly reduced first-year therm savings (98% realization) and a 98% lifecycle MMBtu realization rate for the project.
- One randomly sampled custom measure *ex ante* calculation referenced an incorrect horsepower different from what was reported in the project documentation. *Ex post* calculations reference the provided psychrometric chart to derive a slightly increased horsepower for the equipment. Modifications made to the calculation inputs resulted in reduced kW summer demand savings (95%), increased first-year kWh savings (109%), resulting in a 109% lifecycle MMBtu realization rate for the project.

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Table 94 lists the CY 2025 *ex ante* and verified gross savings by first-year and lifecycle gross savings for the Large Industrial offering.

Table 94. CY 2025 Large Industrial Offering *Ex Ante* and Verified Gross Savings

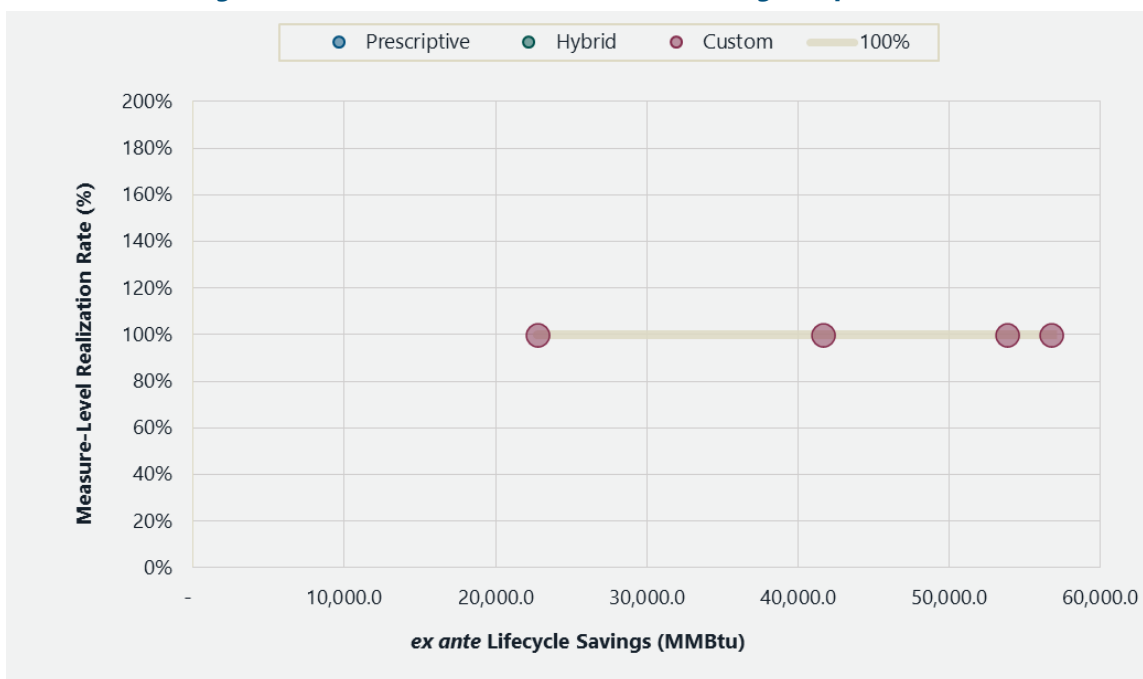
	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	106,336,592	12,806	12,451	6,896,182	106,336,592	12,806	12,451	6,827,220
Lifecycle Gross Savings	1,524,681,515	12,806	12,451	104,857,017	1,524,681,515	12,806	12,451	103,808,446

EDA/EDR Offering: Verified Gross Savings Results

For the EDA/EDR offering, the evaluation team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The EDA/EDR evaluation procedure involves reviewing the SIM files, the NEO modeling results, the written report, the project specifications, and the data entered into the project tracking system, and looking for consistency across all documents. The evaluation team conducted interviews for a portion of the sampled EDA/EDR measures and compared any additional documentation collected from customers during interviews against the rest of the submitted documentation to ensure alignment of reported values. Where there were discrepancies or a lack of additional information, the evaluation team considered the ModelSim reports to be the final as-built and based the evaluated savings on that output.

The offering had a gross lifecycle MMBtu realization rate of 100%. Figure 75 illustrates the magnitude and associated realization rates for *ex ante* MMBtu savings of the sampled projects.

Figure 75. CY 2025 New Construction Offering Sample Results



As Figure 75 shows, all four projects generally maintained within ±5% of a 100% realization rate, with minor fluctuations that rounded to 100%. For two of the four sampled EDA measures, there were very slight discrepancies across the verified ModelSim report, which is the direct output from the modeling platform (one project used NEO and one project used FileBuilder), the written verification report, and the *ex ante* value reported within the SPECTRUM database. The evaluation team modified the final savings values to reflect the ModelSim reports. For one of these projects, the kW summer peak demand realization rate was 98%. All evaluated projects rounded to 100% lifecycle MMBTU realization.

Table 95 lists the CY 2025 *ex ante* and verified gross savings by first-year and lifecycle gross savings for the EDA/EDR offering.

Table 95. CY 2025 EDA/EDR Offering Ex Ante and Verified Gross Savings

	Ex Ante Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	2,454,867	533	328	3,752	2,454,867	533	328	3,677
Lifecycle Gross Savings	49,097,340	533	328	75,040	49,097,340	533	328	73,539

10.2.3. Verified Net Savings Results for the Large Industrial Program

The evaluation team used CY 2023 participant survey results to assess net savings for the CY 2025 Large Industrial Program. To calculate the NTG for each offering in CY 2023, the team combined the self-reported freeridership and participant spillover results using the following equation:

$$NTG = 1 - \text{Freeridership Ratio} + \text{Participant Spillover Ratio}$$

Table 96 shows the CY 2023 NTG ratios applied to the CY 2025 Large Industrial Program offerings. The 2023 Evaluation Report contains the full detailed analysis of NTG completed in CY 2023.²²

Table 96. CY 2025 Large Industrial Program NTG Ratios by Offering

Offering	Freeridership	Spillover	NTG Ratio
Large Industrial	8%	0%	92%
EDA/EDR	7%	0%	93%

Table 97 shows the total lifecycle gross verified savings, lifecycle net savings, and final NTG ratios for the Large Industrial Program in CY 2025.

Table 97. CY 2025 Large Industrial Program Lifecycle Net Savings and NTG

	Total Lifecycle Gross Verified Savings (MMBtu)	Total Lifecycle Net Savings (MMBtu)	NTG Ratio
Large Industrial	15,583,058	14,336,413	92%
EDA/EDR	174,874	162,633	93%
Total	15,757,932	14,499,046	92%

10.3. Process Evaluation

This section discusses process evaluation activities conducted in CY 2025 related to the Large Industrial Program and all nonresidential programs.

10.3.1. Process Evaluation Methodology

The CY 2025 Large Industrial process assessed participant satisfaction and explored nonresidential participants' and trade allies' communication preferences through participant surveys and in-depth interviews. Table 98 lists the process evaluation data collection activities completed for the Large Industrial Program in CY 2025 and counts of activities completed for all primary data collection efforts.

Table 98. CY 2025 Large Industrial Process Evaluation Activities and Sample Sizes

Activity	CY 2025 Completes (n)
Program Documentation Review	✓
Ongoing Participant Satisfaction Surveys	66
Participant Surveys	80 Business and Industry, 25 Large Industrial
Trade Ally Interviews	25 across all nonresidential programs

²² Cadmus. May 17, 2024. *Focus on Energy Calendar Year 2023 Evaluation Report – Volume III Appendices. Appendix G. Net Savings Analysis. Prepared for Focus on Energy.* https://assets.focusonenergy.com/production/inline-files/Evaluation_CY_2023_Vol-III_Appendices_final.pdf

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Program Documentation Review

The evaluation team reviewed the Large Industrial Program's implementation and marketing plans to understand the program's structure and plans for CY 2025. The team also reviewed miscellaneous documentation, like quarterly performance reports to the PSC from the program administrator, to understand program updates and progress in CY 2025.

Ongoing Participant Satisfaction Surveys

Using contact information stored in SPECTRUM, the program administrator oversaw web-based satisfaction surveys of CY 2025 participants. There were two objectives for these satisfaction surveys:

- Understand customer satisfaction on an ongoing basis and respond to any changes in satisfaction before the end of the annual reporting schedule
- Help to facilitate timely follow-up with customers to clarify and address service concerns

A total of 66 Large Industry Program participants responded to the CY 2025 survey. The survey covered several topics, including overall satisfaction, satisfaction with offering staff and trade allies, the likelihood of recommending Focus on Energy, and other feedback.

Cross-Cutting Nonresidential Program Research

In CY 2025, the evaluation team conducted surveys and interviews that cut across Focus on Energy's nonresidential programs to explore the following research topics:

- **Participant Surveys.** The team surveyed recent Business and Industry and Large Industrial program participants to explore communication preferences, such as timing, frequency, and medium of communication, by customer segment. The details of the methodologies and findings of this research are described in the *Nonresidential Cross-Cutting Research* section of the report.
- **Trade Ally interviews.** The evaluation team interviewed a sample of trade allies across all programs to explore optimal timing, frequency, and medium of program communications. Interviews also collected feedback on prescriptive rebate activity and general program participation. The details of the methodologies and findings of this research are described in the *Nonresidential Cross-Cutting Research* section of this report.

10.3.2. Program Design and Delivery

Customers primarily participate in the Large Industrial Program through custom and prescriptive incentives. The Large Industrial offering provides incentives for a broad range of energy-efficient prescriptive measures and custom projects, while the EDA/EDR offering provides design assistance or review for new construction buildings in addition to incentives. Customers can apply for incentives directly through Focus on Energy or their trade ally, with support from energy advisors, other program staff, and occasionally from their utility account representatives.

Energy advisors primarily use a customer relationship management approach for this program. Each Large Industrial energy advisor is assigned a set of customers by geography, taking into account the advisor's industry expertise. Energy advisors aim to reach out to all their customer contacts at least three times each year to develop a deeper understanding of the customers' needs.

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Special Promotions and Incentives

In CY 2025, Focus on Energy offered two bonuses through the Large Industrial Program:

- **Trade Ally Prescriptive Bonus.** The prescriptive trade ally bonus is available to registered trade allies to encourage them to promote the Focus on Energy program. In CY 2025, trade allies received a bonus equal to 15% of the customer incentive or \$30 (whichever was greater) for completed projects. Trade allies must be registered to receive the bonus.
- **Custom Design Trade Ally Bonus.** The custom design trade ally bonus is available to trade allies completing custom projects and is considered an expansion of the prescriptive trade ally bonus. It is intended to reward trade allies for assisting with pre-approvals associated with custom projects. Trade allies must be registered, complete an impact statement embedded in the custom workbook, and request the bonus prior to project preapproval. In CY 2025, trade allies received a bonus that was 10% of the customer incentive, up to \$10,000, for completed projects.

10.3.3. Ongoing Participant Satisfaction Survey

Throughout CY 2025, the administrator invited Large Industrial participants to take a web-based satisfaction survey. The following sections present survey results from the 66 participants who completed the survey.

Awareness

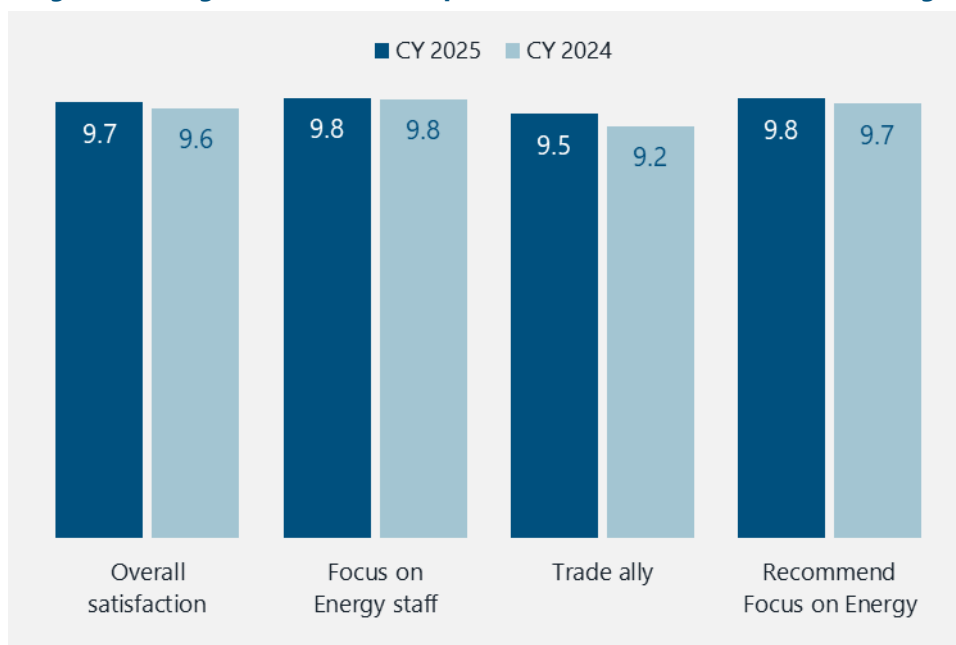
The participant satisfaction survey asked respondents how they learned about the Large Industrial Program. In CY 2025, most respondents said they learned about it from Focus on Energy energy advisors (42%, n=65), followed by previous experience with Focus on Energy offerings (35%). These were also the top responses in CY 2024 and CY 2023.

Participant Experience

The survey asked participants to rate their satisfaction with the program and the likelihood of recommending Focus on Energy on a scale of 0 to 10, where 10 indicated the highest degree of satisfaction or likelihood and 0 the lowest.²³ As Figure 76 shows, CY 2025 respondents gave the Large Industrial Program an average overall satisfaction score of 9.7, statistically equivalent to 9.6 in CY 2024. The other ratings from respondents were also consistent between CY 2025 and CY 2024.

²³ The number of participants who completed a survey does not always match the number of responses for each question, as some participants skipped or did not know answers to questions.

Figure 76. Large Industrial Participant Satisfaction and Likelihood Ratings

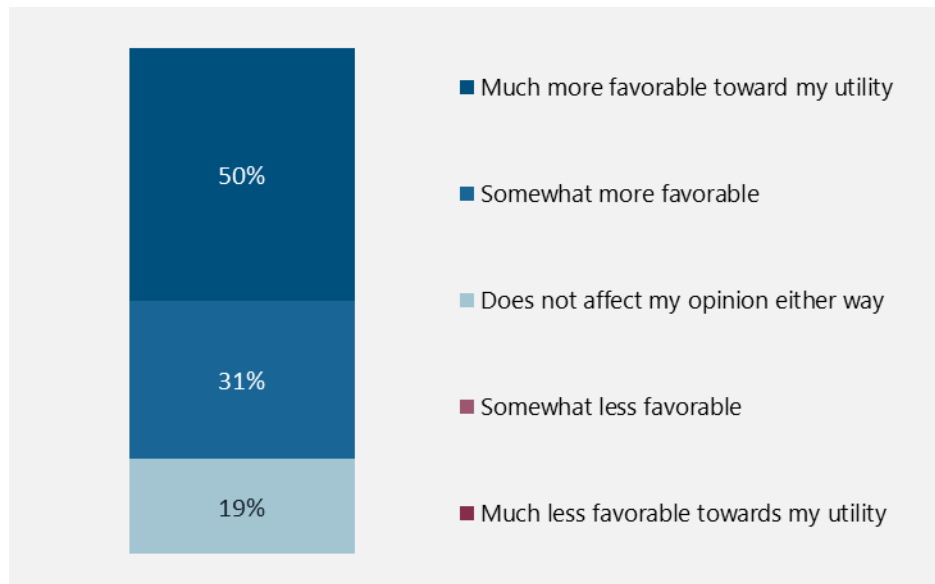


Source: Large Industrial and Business and Industry Program Participant Satisfaction Survey Questions. “Overall, how satisfied are you with your most recent experience with Focus on Energy?” (CY 2025 n=66; CY 2024 n=56). “How satisfied are you with the Energy Advisor or Focus on Energy staff member who assisted you with your project?” (CY 2025 n=65; CY 2024 n=55). “How satisfied are you with the contractor(s) that you worked with on this project?” (CY 2025 n=47; CY 2024 n=44). “How likely are you to recommend Focus on Energy to others?” (CY 2025 n=66; CY 2024 n=55). There are no statistically significant differences between CY 2025 and CY 2024 ratings.

Using the survey data, the evaluation team calculated an NPS based on customers’ likelihood to recommend Focus on Energy. The NPS is expressed as an absolute number between -100 and +100, representing the difference between the percentage of promoters (respondents rating 9 or 10) and detractors (respondents rating 0 to 6). High NPS scores (+70 or higher) are theoretically predictive of customer behaviors, such as participating in another offering, implementing additional energy improvements, and referring Focus on Energy offerings to others. The Large Industrial Program’s NPS remained very high at +97 for CY 2025, similar to +95 for CY 2024.

Respondents were asked whether they were aware that the Large Industrial Program was offered in partnership with their local utility before receiving the satisfaction survey. Eighty-nine percent (n=66) were aware in CY 2025, the highest rate of awareness for any Focus on Energy program, as it had also been in CY 2024 and CY 2023. Respondents were also asked whether Focus on Energy offerings affected their opinion of their utilities. Eighty-one percent reported that their opinion had become *much more favorable* or *somewhat more favorable*, while none reported that their opinion had become *much less favorable* or *somewhat less favorable*, and 19% said their opinion did not change. Figure 77 shows the full breakdown of respondents’ opinions of utilities.

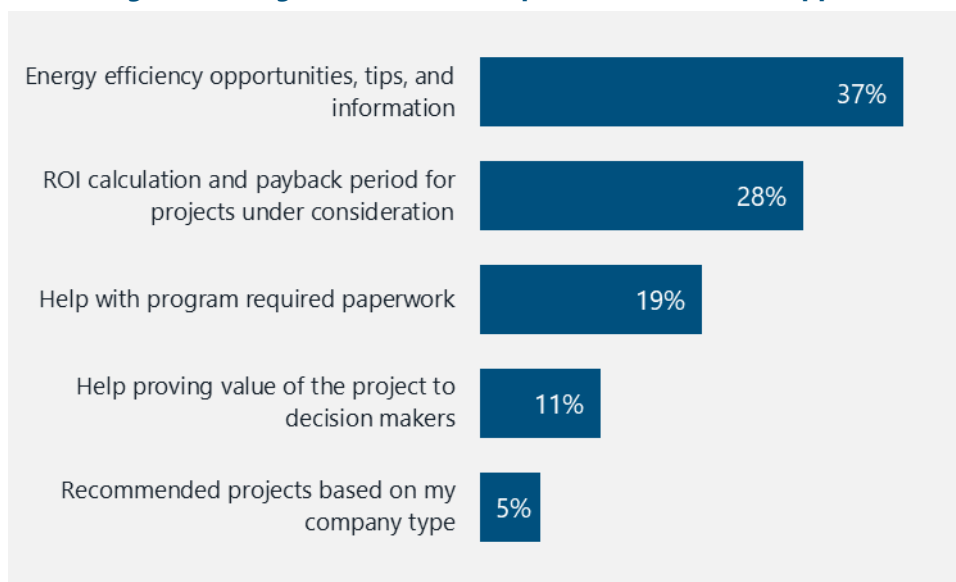
Figure 77. Large Industrial Participants' Opinions of Utilities



Source: Large Industrial Participant Satisfaction Survey Question: “How have these offerings affected your opinion of your energy utility, if at all?” (n=64). No responses were received for the options *somewhat less favorable* and *much less favorable*.

Survey respondents identified how Focus on Energy could best support their organization with future projects (Figure 78). The most frequent responses from CY 2025 participants were energy efficiency opportunities, tips, and information (37%), which was also the most common response in CY 2024. In CY 2025, more Large Industrial respondents mentioned return on investment (ROI) calculation and payback period (28%) and help with paperwork (19%), compared to CY 2024 (19% and 9% respectively, n=53). In contrast, few respondents mentioned recommending projects based on company type (5%) compared to CY 2024 (30%).

Figure 78. Large Industrial Participants' Most Valued Support



Source: Large Industrial Participant Satisfaction Survey Question: “Aside from providing project incentive dollars, how can Focus on Energy best support your organization going forward?” (n=57)

Participant Feedback and Suggestions for Improvement

The survey asked participants if they had any comments or suggestions to improve the program. Of the 66 participants who responded to the survey, 36% provided open-ended feedback, which the evaluation team coded into 26 mentions. Of these mentions, 24 were positive or complimentary, and two suggested improvements. Nine of the 24 positive comments praised the energy advisors who worked on their projects: four noted the program's ease and convenience, three reported satisfaction with costs and energy savings, one reported satisfaction with timely communications and information, and seven reported a generally positive experience. The two suggested lengthening the period for submitting an application after installation and reducing delays in processing application paperwork.

In CY 2025, the satisfaction survey included an open-ended question soliciting comments on participants' experience with trade allies. Twenty-two Large Industrial respondents made comments, of which 20 were positive and complimentary. One respondent said they had to “constantly inquire on [the] status” of the project and felt their contractor did not prioritize it. The other respondent described a “small hiccup” with a valve that was not installed correctly, leading to “energy loss and effluent increase for a period of time.”

10.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a DSM offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III includes a description of the TRC test.

Table 99 lists the CY 2025 incentive costs for the Large Industrial Program.

Table 99. CY 2025 Large Industrial Incentive Costs

Offering	Incentive Costs
Industrial Technology Accelerator	\$37,124
Large Industrial	\$8,704,560
EDA/EDR	\$224,774
Total	\$8,966,458

The evaluation team found that the CY 2025 Large Industrial Program was cost-effective (4.54). Table 100 lists the evaluated costs and benefits.

Table 100. CY 2025 Large Industrial Costs and Benefits

Cost and Benefit Category	Total
Costs	
Administration Costs	\$381,857
Delivery Costs	\$5,704,450
Incremental Measure Costs	\$34,773,234
Total Non-Incentive Costs	\$40,859,541
Benefits	
Electricity Benefits (kWh)	\$30,824,246
Capacity Benefits (kW)	\$29,291,444
Gas Benefits	\$8,405,860
Emissions Benefits	\$44,268,536
T&D Benefits (kW)	\$72,906,085
Total TRC Benefits	\$185,696,172
Net TRC Benefits	\$144,836,630
TRC Benefit/Cost Ratio	4.54

10.5. Outcomes

The evaluation team identified the following outcomes and recommendations based on the CY 2025 Large Industrial Program evaluation. Additional outcomes and recommendations from the cross-cutting process evaluation activities can be found in discussions about those specific research activities, referenced in the *Nonresidential Cross-Cutting Research* section.

Outcome 1. Reported *ex ante* savings were highly accurate. First-year and annual MMBtu energy realization rates were 100% for the Large Industrial Program in CY 2025, indicating high accuracy in quantifying estimated energy savings.

Outcome 2. Large Industrial participant satisfaction remained high in CY 2025. Participants gave the program an overall satisfaction score of 9.7, which was statistically equivalent to 9.6 in CY 2024. This satisfaction is supported by the high NPS of +97 for CY 2025, suggesting that participants are likely to recommend Focus on Energy to others.

11. Schools and Government Program

Through the Schools and Government Program, Focus on Energy offers technical assistance and financial incentives to schools, local agencies, and nonlocal governments in Wisconsin.

The Schools and Government Program consists of two primary offerings: Schools and Government, along with access to cross-cutting services through the Energy Design Assistance and Energy Design Review (EDA/EDR) offering, further detailed below:

- **Schools.** This offering is available to private and public K-12 schools and higher education institutions, including universities, colleges, and technical colleges. It provides technical assistance, as well as prescriptive and custom incentives.
- **Government.** This offering is available to local government entities, including municipalities, counties, and wastewater facilities, as well as non-local government entities, including tribes, state, and federal facilities in Wisconsin. It also provides technical assistance, as well as prescriptive and custom incentives.
- **Energy Design Assistance/Energy Design Review (EDA/EDR).** This cross-cutting offering is available for new construction, major renovation, and addition projects over 5,000 square feet. It provides a whole-building energy analysis of multiple design options and incentives based on the building's overall energy savings. This offering is also available through the Business and Industry, Large Industrial, and Multifamily programs.

Prescriptive rebates and custom incentives are available through the Schools and Government offerings for the following qualifying projects:

- *Prescriptive rebates* are offered for standard equipment installations or replacements in an existing building or new construction.
- *Custom incentives* are offered for nonstandard equipment installations or replacements in existing buildings or new construction. Custom incentives are also available for non-solar PV renewable technologies, such as biogas, biomass, solar thermal, and wind technologies.

The Schools and Government Program is administered by APTIM and implemented by CESA 10 and its subcontractor, Leidos. Willdan, the EDA/EDR implementer, conducts building analysis and energy modeling to support the EDA/EDR offering.

In addition to the Schools, Government, and EDA/EDR offerings, the program provides secondary opportunities to participate:

- **Boiler Tune-Up (January 2015-Present):** Boiler tune-up incentives are available to all Schools and Government customers who complete preventative maintenance on natural gas boilers. The incentive paid \$0.05 per MBh of boiler, up to 100% of the tune-up cost, in CY 2025.
- **Project Assessment Incentive (PAI) (January 2014-Present):** The PAI offers cost sharing for the development or engineering of complex energy-saving projects where energy savings are not immediately known. In CY 2025, the incentive paid 50% of the assessment cost or 20% of the estimated annual energy cost savings, whichever was lower, up to \$15,000. This opportunity is

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available to all Schools and Government customers and requires pre-approval by Focus on Energy. As of CY 2025, PAIs were available to all Schools and Government customers, as well as new or underutilized existing biogas and biomass systems.

- **Retro-commissioning (January 2022-Present):** Retro-commissioning is the process of improving the performance and energy efficiency of building systems and equipment via low- and no-cost modifications to building controls and protocols. Incentives are based on square footage, with a base rate and additional incentives based on a reduction in energy use intensity. In CY 2025, incentives covered up to 75% of the project cost, up to \$100,000 per project. The opportunity is designed for properties older than five years old and 5,000 square feet or larger. This opportunity is available to all Schools and Government customers, and enrollment is required prior to project initiation.
- **Strategic Energy Management (January 2021-Present):** The strategic energy management (SEM) opportunity provides participants with guidance and technical assistance to advance energy-management capabilities and establish a continuous energy-management improvement process resulting in low- and no-cost operational energy improvements. In CY 2025, this opportunity offered two incentives to all higher education customers:
 - *Enrollment Incentives:* \$750 paid upon scheduling an audit and \$750 paid upon completion of a year's enrollment in the offering and after completing one energy improvement.
 - *Energy Savings Incentives:* \$0.02 per kWh and \$0.20 per therm saved, up to \$50,000 per site per year.
- **Wastewater Plant Assessments (June 2018-Present):** Municipal government wastewater facilities can receive incentives to assess the energy efficiency of a wastewater plant using a specialized wastewater service provider. The assessment reviews the energy-saving potential of equipment upgrades, operational modifications, and facility improvements. This offering is available to all Schools and Government customers. In CY 2025, the incentive covered 90% of the assessment cost, up to \$5,000, and was paid to the service provider. The remaining cost is billed to the customer.
- **Whole Building Tune-Up (April 2022-Present):** The whole-building tune-up allows customers to upgrade common control systems without requiring a facility audit or verification data. It is available to all Schools and Government customers, but it is designed for smaller buildings with a building automation system. The tune-up includes optimization measures for heating, cooling, ventilation, and hot water systems, to be implemented the same day by a trade ally. The trade ally then submits the application online via Formstack. In CY 2025, customers could receive \$500 for each measure. Trade allies could also receive a \$200 incentive for completing a building health report.

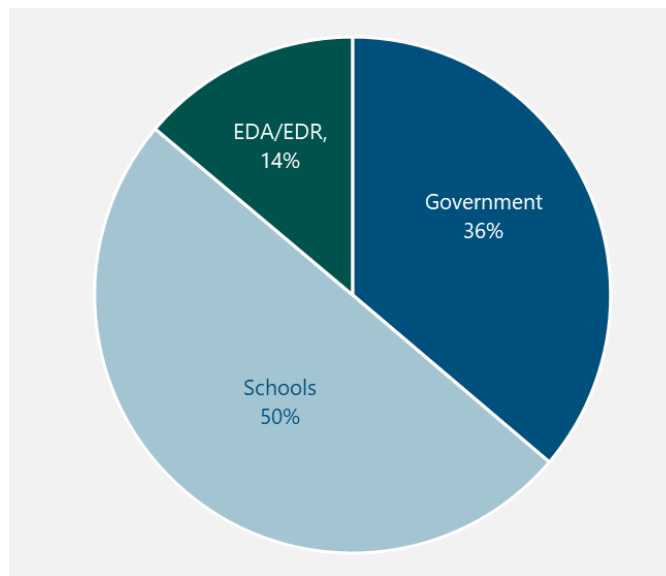
Table 101 summarizes the performance and savings impacts of the Schools and Government Program in CY 2025.

Table 101. CY 2025 Schools and Government Program Summary

Item	Units	CY 2025
Incentive Spending	\$	11,226,134
Participation	Number of Participants	535
Verified Gross Lifecycle Savings	kWh	1,140,107,425
	kW Summer Peak	8,830
	kW Winter Peak	8,520
	therms	74,721,441
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%
Annual NTG Ratio	% (MMBtu)	74%
Net Annual Savings	kWh	53,703,147
	kW Summer Peak	6,682
	kW Winter Peak	6,492
	therms	3,407,023
Net Lifecycle Savings	MMBtu	8,413,778
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	2.29

Figure 79 shows the proportion of Schools and Government Program savings by offering. In CY 2025, the Schools offering contributed 50% of the gross lifecycle MMBtu savings to the program, the Government offering contributed 36%, and the EDA/EDR offering remained at 14%.

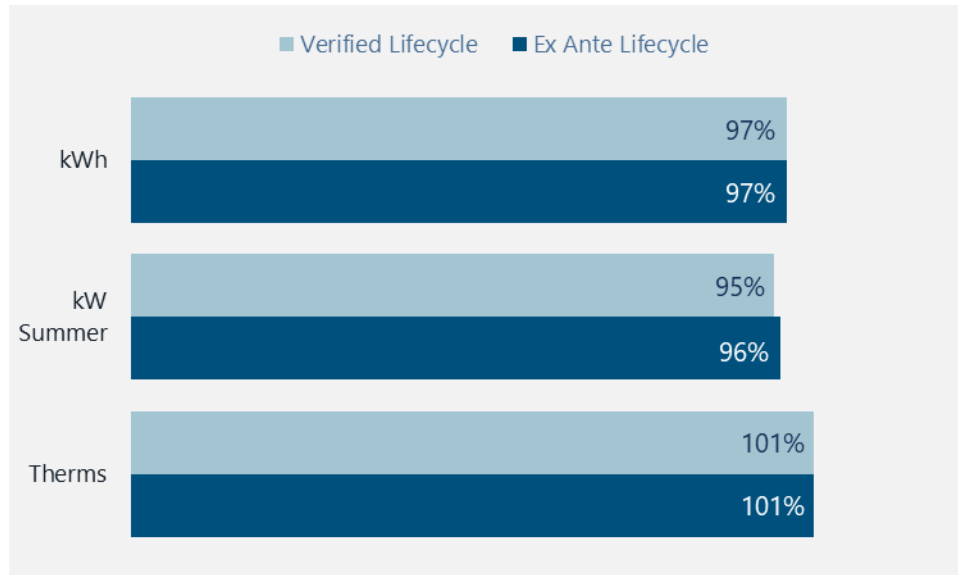
Figure 79. Schools and Government Program Achievement of Gross Lifecycle Savings by Offering



11.1. Achievement Against Goals

As shown in Figure 80, in CY 2025, the Schools and Government Program achieved 97% of its electric savings goal, 95% of its summer peak demand savings goal, and 101% of its therm savings goal based on verified gross lifecycle savings at the program level.

Figure 80. CY 2024 Schools and Government Program Achievement of Gross Lifecycle Savings Goals



Note: 100% *ex ante* gross lifecycle savings reflect the implementer’s contract goals for CY 2025. Verified gross lifecycle savings contribute to the administrator’s portfolio-level goals. Winter kW goals were not established for CY 2025.

11.2. Impact Evaluation

This section contains the findings for the CY 2025 impact evaluation of the Schools and Government Program.

11.2.1. Impact Evaluation Methodology

The evaluation team designed the CY 2025 impact evaluation, measurement, and verification approach to integrate multiple perspectives into its assessment of program performance. The team used the following approaches to measure the impact of the Schools and Government Program:

- Tracking database review
- Engineering desk reviews
- Virtual verification site visits and interviews
- Engineering savings calculations

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Table 102 lists the sample sizes used for the impact evaluation of the Schools and Government Program. These activities and their findings are further detailed below.

Table 102. CY 2025 Schools and Government Impact Evaluation Activities and Sample Sizes

Offering	Total Measures	Impact Evaluation Sample		
		Desk Reviewed Measures	Virtually Verified Measures	% Sampled (by Ex Ante MMBtu Savings)
Government	1,544	33	17	29%
Schools	2,876	37	19	8%
EDA/EDR	120	18	9	54%
Total	4,540	88	45	22%

Engineering Desk Reviews

The evaluation team reviewed all available project documentation in SPECTRUM for a sample of 88 measures offered through the CY 2025 Schools and Government Program. This review included an assessment of the implementer’s savings calculations and methodology. The team relied on the applicable TRMs and other relevant secondary sources as needed. Secondary sources included energy codes and standards, case studies, and energy efficiency program evaluations of comparable measures (based on geography, sector, measure application, and date of issue).

For prescriptive measures, the team used the Focus on Energy 2025 TRM and associated work papers as the primary sources to determine methodology and data in nearly all cases. For hybrid and custom measures, the team reviewed the SPECTRUM savings analysis workbooks and adjusted inputs and methodologies as necessary based on engineering judgment and project documentation.

To conduct the impact analysis of the offering, the evaluation team selected a representative sample of measures and then extrapolated the findings from a random sample to the larger population. In CY 2025, this process used census and random sampling, as described below:

- **Census sampling** selected the measures with the largest savings by offering (called census measures). The team used a percentage distribution analysis to determine the savings threshold, as it varies by offering. The census sample included most measures larger than 5% of each offering’s lifecycle MMBtu savings by sampling wave. Because these measures were sampled with certainty (100% of the eligible highest saving measures were sampled), the team did not extrapolate the results to the offering’s population.
- **Random sampling** randomly selected measures from the population of offering measures (called randomly sampled measures). The team extrapolated the cumulative realization rate of randomly sampled measures by offering them to the remaining population of the offering.

Virtual Verification Site Visits

The evaluation team conducted 45 virtual verification site visits, including interviews with the site contact. Virtual site visits were conducted for sampled measures where the savings impact was high, the measure type was hybrid or custom, or there were outstanding questions that required clarification to complete

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the evaluation of the measure. Evaluation staff verified the type and quantity of equipment installed, determined how the installed equipment is controlled, and documented operating hours. The team then verified savings calculation input parameters based on operational and occupancy schedules, reported and observed set points, trend data, utility data, and any other relevant details identified before contact with the site.

11.2.2. Verified Gross Savings Results for the Schools and Government Program

Table 103 lists the first-year and lifecycle realization rates for the CY 2025 Schools and Government Program by offering. Table 104 summarizes verified first-year and lifecycle savings by offering. Overall, the Schools and Government Program achieved a first-year evaluated realization rate of 100%, weighted by total (MMBtu) energy savings. Note that at the measure level, there was variability between fuel types in terms of the realization rates. The team determined realization rates by stratum, such as census and sample strata, and summed reported and verified savings at the offering level to arrive at savings and realization rates. Detailed findings for each offering, including factors affecting the realization rates, are discussed in the next sections of this report.

Table 103. CY 2025 Schools and Government Program First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Government	100%	98%	100%	100%	100%	100%	100%	100%
Schools	100%	100%	100%	100%	100%	100%	100%	100%
EDA/EDR	100%	100%	100%	100%	100%	100%	100%	100%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Table 104. CY 2025 Schools and Government Program First-Year and Lifecycle Verified Energy Savings Summary

Offering	Verified First-Year Savings					Verified Lifecycle Savings		
	kWh	kW Summer	kW Winter	therms	MMBtu ^a	kWh	therms	MMBtu ^a
Government	31,340,662	2,442	2,562	1,249,599	231,894	457,915,391	23,737,013	3,936,109
Schools	29,485,663	4,518	3,946	3,022,527	402,858	456,031,694	42,945,448	5,850,525
EDA/EDR	11,308,017	1,874	2,012	401,949	78,778	226,160,340	8,038,980	1,575,557
Total	72,134,342	8,830	8,520	4,674,076	713,530	1,140,107,425	74,721,441	11,362,191

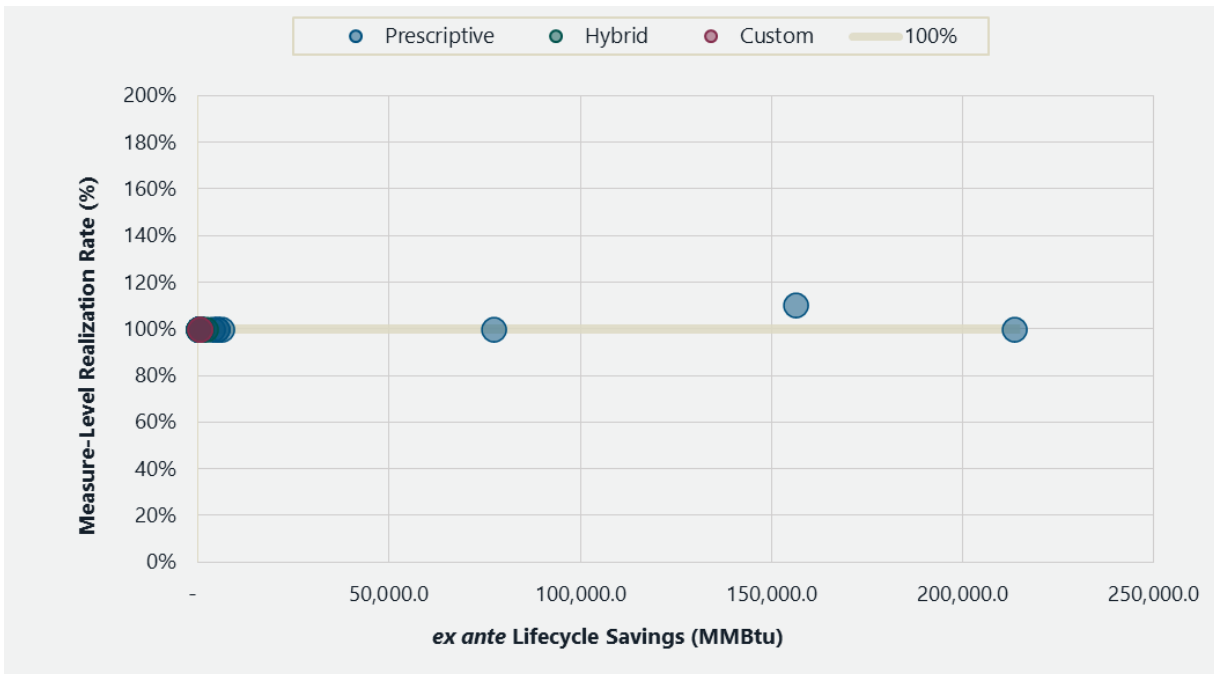
^a Verified kWh and therm savings may not sum to verified MMBtu values due to conversion/rounding associated with measure-level application of realization rates.

Schools Offering: Verified Gross Savings Results

For the Schools offering, the evaluation team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The offering had a gross lifecycle MMBtu realization rate

of 100%. Figure 81 shows the magnitude and associated realization rates for *ex ante* MMBtu savings of the sampled projects.

Figure 81. CY 2025 Schools Offering Sampling Results



The evaluation team found projects generally maintained within $\pm 5\%$ of a 100% realization rate, with minor fluctuations. The following describes the main factors that affected the measure realization rates:

- The evaluation team found differences in deemed savings values used in *ex ante* versus the Focus on Energy 2025 TRM for one prescriptive measure (MMID 3276). The *ex post* savings calculation utilizes current-year (2025 TRM) deemed savings values for the updated MMID for this measure type (MMID 10207), which results in higher first-year and lifecycle therm savings and an overall lifecycle MMBtu realization rate of 110%.

Table 105 lists the CY 2025 *ex ante* and verified gross savings for the Schools offering.

Table 105. CY 2025 Schools Offering *Ex Ante* and Verified Gross Savings

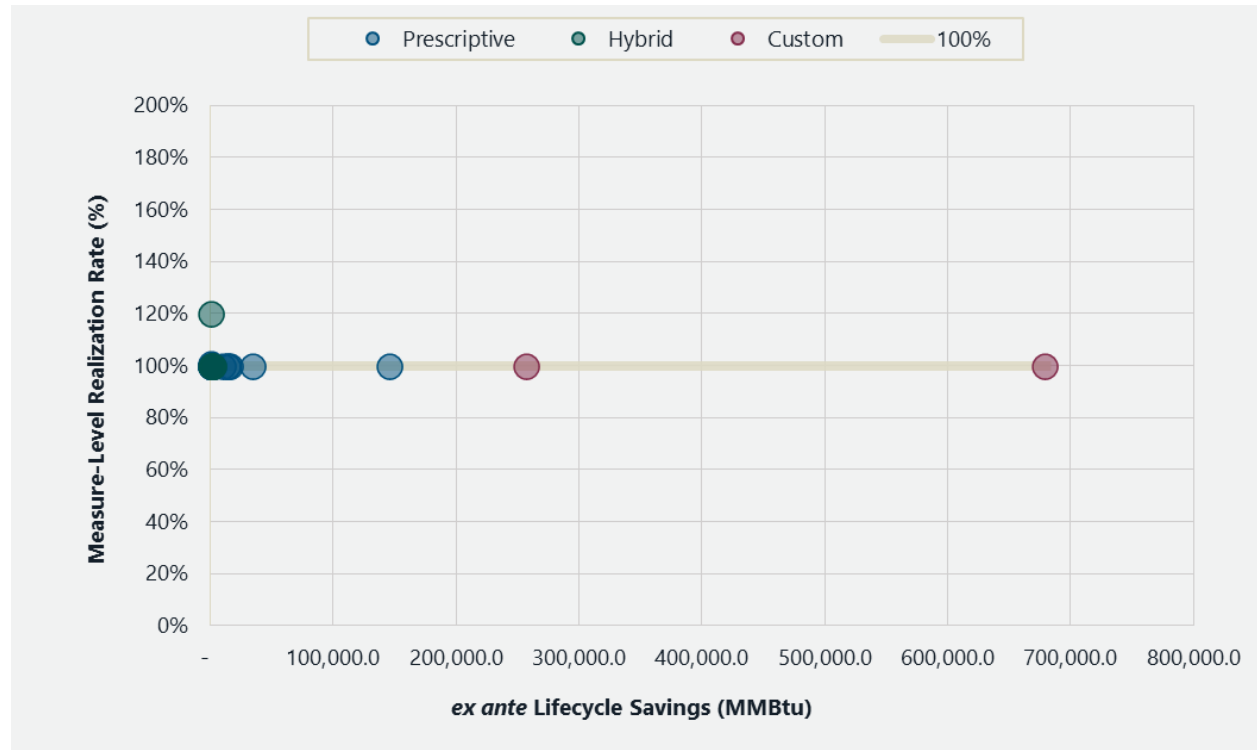
	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	29,485,663	4,518	3,946	3,022,527	29,485,663	4,518	3,946	3,022,527
Lifecycle Gross Savings	456,031,694	4,518	3,946	42,945,448	456,031,694	4,518	3,946	42,945,448

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Government Offering: Verified Gross Savings Results

For the Government offering, the evaluation team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The offering had a gross lifecycle MMBtu realization rate of 100%. Figure 82 shows the magnitude and associated realization rates for reported MMBtu savings of the sampled projects.

Figure 82. CY 2025 Government Offering Sampling Results



The evaluation team found projects generally maintained within $\pm 5\%$ of a 100% realization rate, with minor fluctuations. The following describes the main factors that affected the measure realization rates:

- The evaluation team found differences in deemed savings values used in *ex ante* versus the Focus on Energy 2025 TRM for one prescriptive measure (MMID 3502). The *ex post* savings calculation utilizes current-year (2025 TRM) deemed savings values for the equivalent measure (MMID 5019), which resulted in slightly higher first-year and lifecycle kWh savings and an overall lifecycle MMBtu realization rate of 101%. The *ex post* deemed saving utilized for this measure resulted in a kW summer demand realization rate of 54%.
- The evaluation team found differences in the expected useful life (EUL) used in *ex ante* versus the Focus on Energy 2025 TRM for one hybrid measure (MMID 3909). The *ex post* savings calculation utilizes the current-year (2025 TRM) EUL value of 18 years, which resulted in the same first-year kWh savings found in *ex ante* but higher lifecycle kWh savings for an overall lifecycle MMBtu realization rate of 120%.

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Table 106 lists the CY 2025 *ex ante* and verified gross savings for the Government offering.

Table 106. CY 2025 Government Offering *Ex Ante* and Verified Gross Savings

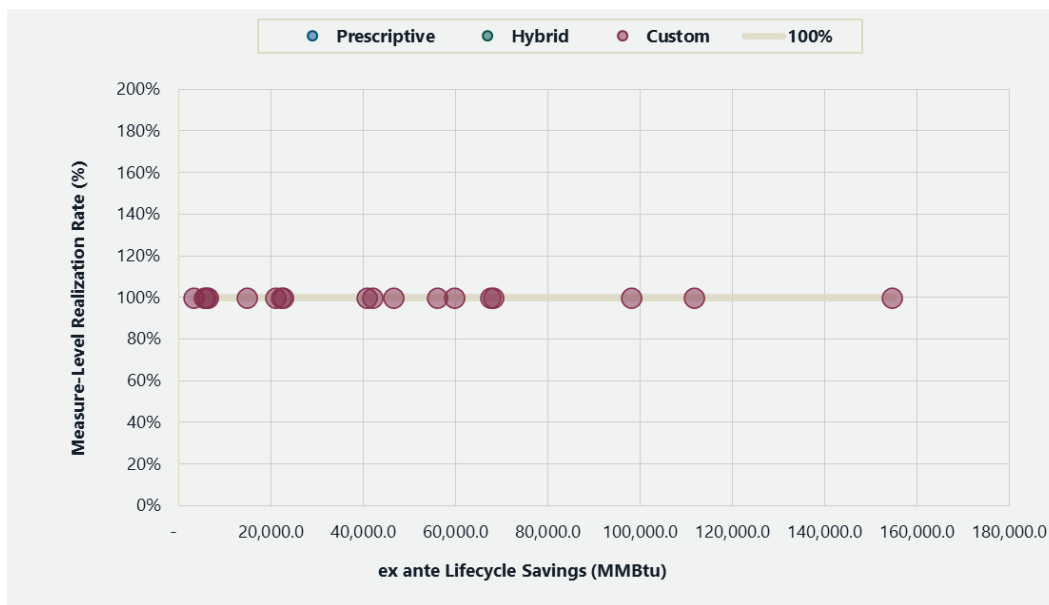
	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	31,340,662	2,492	2,562	1,249,599	31,340,662	2,442	2,562	1,249,599
Lifecycle Gross Savings	457,915,391	2,492	2,562	23,737,013	457,915,391	2,442	2,562	23,737,013

EDA/EDR Offering: Verified Gross Savings Results

For the EDA/EDR offering, the evaluation team conducted a database review, desk reviews, interviews, and virtual site visits to inform verified gross savings. The EDA/EDR evaluation procedure involves reviewing the SIM files, the NEO modeling results, the written report, the project specifications, and the data entered into the project tracking system, and looking for consistency across all documents. The evaluation team conducted interviews for a portion of the sampled EDA/EDR measures and compared any additional documentation collected from customers during interviews against the rest of the submitted documentation to ensure alignment of reported values. Where there were discrepancies or a lack of additional information, the evaluation team considered the ModelSim reports to be the final as-built and based the evaluated savings on that output.

The offering had a gross lifecycle MMBtu realization rate of 100%. Figure 83 shows the magnitude and associated realization rates for *ex ante* MMBtu savings of the sampled projects. Most verified savings calculations did not deviate from *ex ante* savings in the EDA/EDR sample for CY 2025.

Figure 83. CY 2025 EDA/EDR Offering Sampling Results



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The following describes the main factors affecting the realization rate:

- For one EDA measure, there were discrepancies between the verified ModelSim report, which is the direct output from the modeling platform (one project used NEO and one project used FileBuilder), the written verification report, and the *ex ante* value reported within the SPECTRUM database. The evaluation team modified the final savings values to reflect the ModelSim reports, resulting in slightly reduced first-year therm savings and an overall lifecycle MMBtu realization rate that rounded to 100%.

Table 107 lists the CY 2025 *ex ante* and verified gross savings for the EDA/EDR offering.

Table 107. CY 2025 EDA/EDR Offering *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	11,308,017	1,874	2,012	401,949	11,308,017	1,874	2,012	401,949
Lifecycle Gross Savings	226,160,340	1,874	2,012	8,038,980	226,160,340	1,874	2,012	8,038,980

11.2.3. Verified Net Savings Results for the Schools and Government Program

The evaluation team used CY 2023 participant survey results to assess net savings for the CY 2025 Schools and Government Program. To calculate the NTG for each offering in CY 2023, the team combined self-reported freeridership and participant spillover results using the following equation:

$$NTG = 1 - \text{Freeridership Ratio} + \text{Participant Spillover Ratio}$$

Table 108 shows CY 2023 NTG ratios applied to the CY 2025 Schools and Government Program. The 2023 Evaluation Report contains the full detailed analysis of NTG completed in CY 2023.²⁴

Table 108. CY 2025 Schools and Government Program NTG Ratio

Offering	Freeridership	Spillover	NTG Ratio
Government	29%	0%	71%
Schools	29%	0%	71%
EDA/EDR	7%	0%	93%

Table 109 shows the total lifecycle gross verified savings, lifecycle net savings, and final NTG ratios for the Schools and Government Program in CY 2025.

²⁴ Cadmus. May 17, 2024. Focus on Energy Calendar Year 2023 Evaluation Report – Volume III Appendices. Appendix G. Net Savings Analysis. Prepared for Focus on Energy. https://assets.focusonenergy.com/production/inline-files/Evaluation_CY_2023_Vol-III_Appendices_final.pdf

Table 109. CY 2025 Schools and Government Program Lifecycle Net Savings and NTG

Offering	Total Lifecycle Gross Verified Savings (MMBtu)	Total Lifecycle Net Savings (MMBtu)	NTG Ratio
Government	3,936,109	2,794,637	71%
Schools	5,850,525	4,153,873	71%
EDA/EDR	1,575,557	1,465,268	93%
Total	11,362,191	8,413,778	74%

11.3. Process Evaluation

This section discusses process evaluation activities conducted in CY 2025 related to the Schools and Government Program and all nonresidential programs.

11.3.1. Process Evaluation Methodology

The CY 2025 process evaluation assessed Schools and Government Program participant satisfaction and explored nonresidential program trade allies’ preferences for receiving program communications through in-depth interviews. Table 110 lists the data collection activities and sample sizes for all primary data collection.

Table 110. CY 2025 Schools and Government Program Process Evaluation Activities

Activity	CY 2025 Completes (n)
Program Documentation Review	✓
Ongoing Participant Satisfaction Surveys	114
Trade Ally Interviews	25 across all nonresidential programs

Program Documentation Review

The evaluation team reviewed the School and Government Program’s implementation and marketing plans to understand the program structure and how it was implemented in CY 2025. The team also reviewed additional documentation, like quarterly performance reports to the PSC from the program administrator, to understand program updates and progress in CY 2025.

Ongoing Participant Satisfaction Survey

Using contact information stored in SPECTRUM, the program administrator oversaw an ongoing web-based satisfaction survey of CY 2025 participants. There were two objectives for these satisfaction surveys:

- Understand customer satisfaction on an ongoing basis and respond to any changes in satisfaction before the end of the annual reporting schedule
- Help to facilitate timely follow-up with customers to clarify and address service concerns

A total of 114 Schools and Government Program participants responded to the CY 2025 survey. The survey covered several topics, including overall satisfaction, satisfaction with offering staff and trade allies, likelihood of recommending Focus on Energy, and other feedback.

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Cross-Cutting Nonresidential Program Research

In CY 2025, the evaluation team conducted trade ally interviews that cut across all of Focus on Energy's nonresidential programs to explore optimal timing, frequency, and medium of program communications. Interviews also collected feedback on prescriptive rebate activity and general program participation. The details of the methodologies and findings of this research are described in the *Cross-Cutting Nonresidential Program Research* section of this report.

11.3.2. Program Design and Delivery

Customers primarily participate in the Schools and Government Program through custom and prescriptive incentives that are available through the individual Schools and Government offerings. These incentives reduce the capital cost of energy efficiency improvement projects. The program is delivered through energy advisors who work with customers in the schools and government sectors to identify projects and submit applications. Energy advisors also conduct energy calculations to determine savings and available incentive dollars for custom projects that require pre-approval. The energy advisors work proactively with customers who are known to have large-scale infrastructure projects in their pipeline and engage responsively with other eligible customers. All but one of the Schools and Government Program energy advisors manage customer relations in a particular territory. One energy advisor focuses on wastewater agencies and manages relationships with the state's 35 largest wastewater plants.

The CY 2025 Schools and Government Program targeted four primary markets:

- **Public and Private K-12 Schools.** This segment was a primary focus for promoting low-cost or no-cost building optimization measures to accommodate state budgets and for expanding participation in rural regions with limited program engagement.
- **Higher Education.** This segment was targeted to increase energy savings through tailored outreach to universities and technical colleges.
- **Tribal.** This segment was targeted to increase engagement through dedicated Tribe Energy Symposiums that connect tribal customers to program incentives and external grant opportunities.
- **Municipalities.** This segment was targeted to increase engagement in rural markets, expand engagement with wastewater trade allies, and increase participation among municipal libraries.

Focus on Energy increased prescriptive incentives on certain measures in CY 2025, including LED fixtures and controls, boiler and HVAC controls, steam trap repairs, energy recovery ventilators, and variable frequency drives for pumps and fans.

Special Promotions and Incentives

In addition to standard incentives, Focus on Energy offered the following special promotions and incentives to Schools and Government customers in CY 2025.

- **Custom Design Trade Ally Bonus (January 2024-Present).** The custom design bonus launched in January 2024 to encourage trade allies to promote the Focus on Energy program during custom project development and increase project savings. In CY 2025, trade allies received a

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bonus that was 10% of the customer incentive, up to \$10,000, for completed projects. Trade allies had to be registered to receive the bonus.

- **Higher Education Kit Challenge (May 2022-Present).** This initiative aimed to engage students at the University of Wisconsin and technical college campuses in implementing energy-efficiency measures in off-campus housing. It offered bonuses and marketing opportunities to the college that engaged the highest percentage of its off-campus housing.
- **Practical Energy Management (January 2024-Present).** This initiative promoted benchmarking concepts by encouraging School and Government customers to monitor their current energy usage and create a continuous energy management plan. Facilities were offered \$1,200 to conduct consistent energy monitoring, with additional incentives available for attending trainings.
- **Project Planning Bonus (January 2022-Present).** This incentive helped Schools and Government customers plan their energy efficiency projects for the upcoming year. In CY 2025, customers who completed and submitted a project planning workbook before purchasing equipment could receive a 10% bonus on all custom and prescriptive projects included in their workbooks. Tribal nations could receive an enhanced project planning bonus, which was a 50% bonus incentive up to \$10,000.
- **Pump Assessment and Variable Speed Drive Bonus (July 2021-Present).** In CY 2025, Focus on Energy offered municipal water and wastewater plants \$500 per pump for a comprehensive pump assessment, up to 100% of the assessment cost. Participants could receive a 50% bonus (up to \$2,000) for installing a variable-speed drive on the plant's pump system following the assessment.
- **Renew Our Schools (Spring 2022-Present).** K-12 schools could enroll in a six-week energy challenge, during which they competed against other schools in Wisconsin to save the most energy. Winners could earn cash prizes for their schools. Schools were required to install an eGauge energy monitor to measure energy savings and determine the challenge winners. Focus on Energy did not claim savings for this initiative.
- **Rural Electric Reduction Accelerator (January 2023-Present).** This initiative provided rural customers with additional incentives to make energy efficiency projects more feasible. Customers in rural zip codes could participate, and funding was available on a first-come, first-served basis.
- **Rural Municipal Roadway Lighting Bonus (January 2023-Present).** This incentive aimed to address rural municipalities' low participation in exterior lighting measures. It offered a 50% bonus on prescriptive incentives for municipally owned exterior lighting fixtures installed in CY 2025.
- **Schools and Government Rural Energy Audit (January 2023-October 2026).** This offering supported rural customers in pursuing energy efficiency opportunities at their facilities. Customers in rural zip codes could receive a sliding scale bonus if they complete the top three energy conservation measures identified in an audit conducted by an energy Advisor.
- **Trade Ally Prescriptive Bonus (July 2023-Present).** This bonus was developed to encourage trade allies to promote the Focus on Energy program. In CY 2025, trade allies received a bonus equal to 15% of the customer incentive or \$30 (whichever was greater) for completed projects. Trade allies had to be registered to receive the bonus.

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- **Tribal Nation Energy Plan Application (January 2022-Present).** In CY 2025, this initiative offered tribal nations an additional \$15,000, up to 100% of the cost of external vendor or internal labor, to create or update their energy plans. This opportunity was originally a limited-time offer available through the Wisconsin Office of Energy Independence in CY 2022. Focus on Energy took over the offering in CY 2023.
- **Utility Bill Verified Savings (January 2023-Present).** For customers who enrolled by December 31, 2023, this initiative provided financial rewards for making facility-wide efficiency improvements after hiring an energy manager or purchasing equipment with advanced monitoring. The initiative provided analysis to quantify the reduction in weather-normalized energy use intensity and provided an incentive based on the energy saved per square foot.

11.3.3. Ongoing Participant Satisfaction Survey

Throughout CY 2025, the program administrator invited Schools and Government participants to take a web-based satisfaction survey. The following sections present survey results from the 114 participants who responded.

Awareness

The participant satisfaction survey asked respondents how they learned about the Schools and Government Program. In CY 2025, most respondents said they learned about it from Focus on Energy advisors and staff (48%, n=111), trade allies (17%), or previous experience with Focus on Energy offerings (17%), which were also the most mentioned sources of awareness in CY 2024.

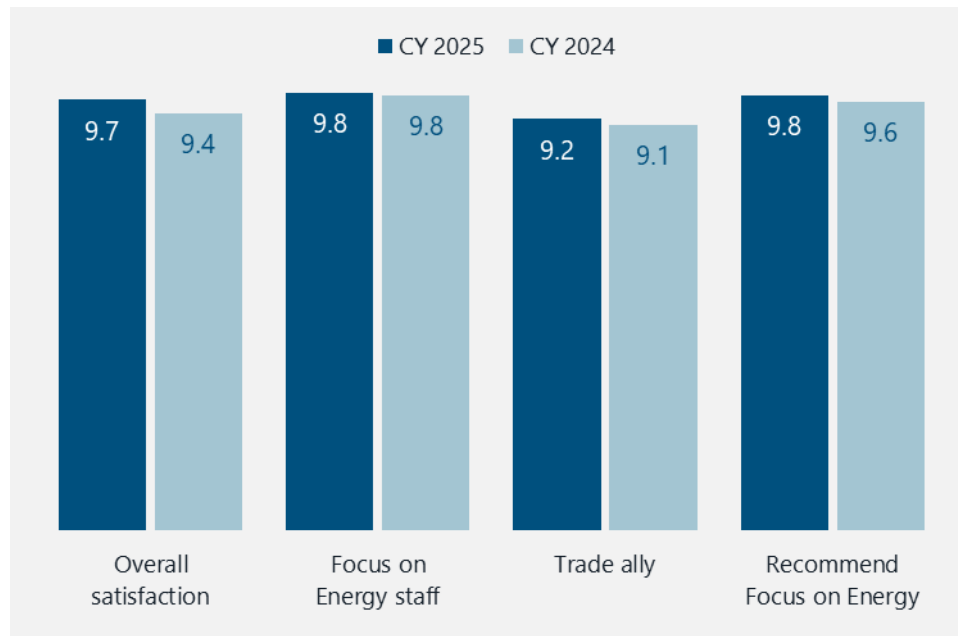
Participant Satisfaction

The survey asked participants to rate their satisfaction and the likelihood of recommending the offering on a scale of 0 to 10, where 10 indicated the highest degree of satisfaction or likelihood and 0 the lowest.

Survey respondents gave the Schools and Government Program an average overall satisfaction rating of 9.7 in CY 2025, higher than but statistically equivalent to the average rating of 9.4 in CY 2024, and similar to the average rating of 9.8 in CY 2023. Figure 84 summarizes these results.²⁵

²⁵ The number of participants who completed a survey does not always match the number of responses for each question as some participants skipped or did not know answers to questions.

Figure 84. Satisfaction and Likelihood Ratings for the Schools and Government Program

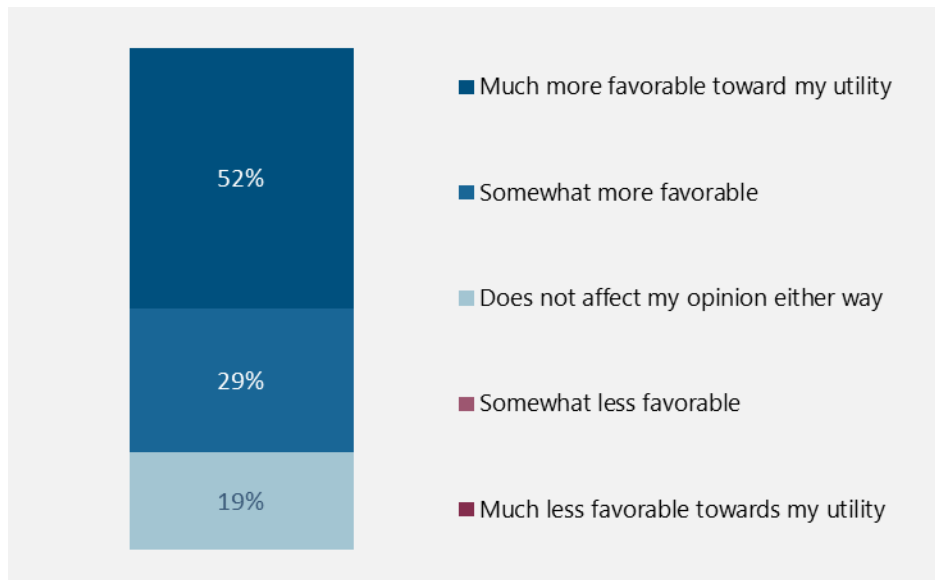


Source: Schools and Government Participant Satisfaction Survey Questions. “Overall, how satisfied are you with your most recent experience with Focus on Energy?” (CY 2025 n=114; CY 2024 n=71). “How satisfied are you with the Energy Advisor or Focus on Energy staff member who assisted you with your project?” (CY 2025 n=110; CY 2024 n=67). “How satisfied are you with the contractor that provided your school or government building update?” (CY 2025 n=85; CY 2024 n=47). “How likely are you to recommend Focus on Energy to others?” (CY 2025 n=114; CY 2024 n=71). There are no statistically significant differences between CY 2025 and CY 2024 ratings.

Using survey data, the evaluation team calculated an NPS based on customers’ likelihood to recommend Focus on Energy. The NPS is expressed as an absolute number between -100 and +100, representing the difference between the percentage of promoters (respondents rating 9 or 10) and detractors (respondents rating 0 to 6). High NPS scores (+70 or higher) are theoretically predictive of customer behaviors such as participating in another offering, implementing additional home energy improvements, and referring Focus on Energy offerings to others. The NPS was +96 for the Schools and Government Program in CY 2025, comparable to +94 in CY 2024.

Respondents were asked whether they were aware the Schools and Government Program was offered in partnership with their local utility before receiving the satisfaction survey. Eighty-three percent of respondents were aware (n=114), the same as 83% in CY 2024. The survey also asked whether Focus on Energy offerings affected their opinion of their utilities, and 81% of respondents said their opinion had become *much more favorable* or *somewhat more favorable*. None of the CY 2025 survey respondents said their opinion had become less favorable, and Figure 8 summarizes these results.

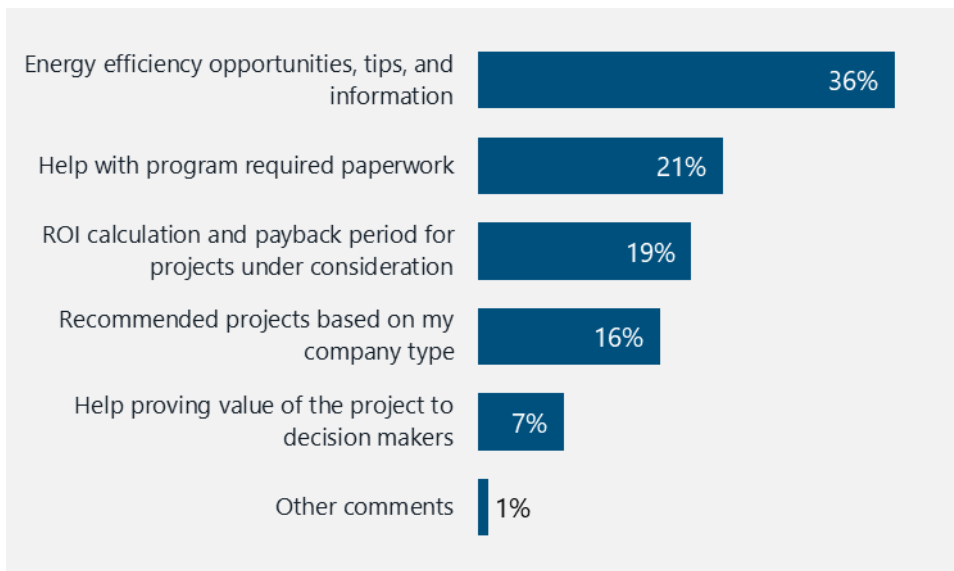
Figure 85. Schools and Governments' Influence on Participants' Opinions of Utilities



Source: Schools and Government Participant Satisfaction Survey Question: "How have these offerings affected your opinion of your energy utility, if at all?" (n=108). No responses were received for the options *somewhat less favorable* and *much less favorable*.

The survey asked participants to identify how Focus on Energy can best support their organization with future projects (Figure 86). Respondents most frequently said energy efficiency opportunities, tips, and information (36%), followed by help with paperwork (21%); these responses were also the top two in CY 2024.

Figure 86. Schools and Government Participants' Most Valued Support



Source: Schools and Government Program Participant Satisfaction Survey Question: "Aside from providing project incentive dollars, how can Focus on Energy best support your organization going forward?" (n=108)

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Participant Feedback and Suggestions for Improvement

The customer satisfaction survey asked participants if they had any comments or suggestions for improving the program. Of the 114 participants who responded, 35% provided open-ended feedback, which the evaluation team coded into 54 mentions. Of these, 48 were positive or complimentary comments (89%), and six included suggestions for improvement (11%).

Twenty-eight of the 48 positive comments praised the Focus on Energy staff and contractors who worked on the projects, while 13 more highlighted the convenience of the program or a generally positive experience. Five respondents expressed satisfaction with cost and energy savings, and two respondents were satisfied with their equipment upgrades.

Two of the six suggestions for improvement related to improving communications: one respondent suggested more advertising for Focus on Energy programs, and another did not recall their Focus on Energy representative reaching out to them during their project. Two more suggestions related to lighting incentives: one respondent suggested removing the incentive cap at 50% of cost, and another suggested offering incentives for more types of LED lighting. One respondent suggested Focus on Energy could provide grant support to municipalities, and one respondent suggested that Focus on Energy staff could assist with “Madison’s Building Energy Savings Project” as the required tune-up specialist, explaining it is “costly for a nonprofit to hire a contractor for this required evaluation, and the energy advisor has this skill already.”

The CY 2025 satisfaction survey included an open-ended question soliciting comments on participants’ experience with trade allies. Forty-five Schools and Government respondents provided comments, most of which were positive and complimentary. In CY 2025, only two respondents rated their satisfaction with contractors a 6 out of 10 or lower, and both provided suggestions for improvement. One respondent explained that although the sales and administrative staff were “great,” they found that “the actual workers were messy and unorganized.” The other reported that their installer did a full power shutdown, which the respondent did not feel was necessary; this caused a day of network and phone outages for the organization. Four more respondents who rated their trade allies a 7 out of 10 or higher offered suggestions for improvement: two of these respondents reported that some members of their project team performed well but others did not, one suggested that their contractor should have provided support with incentive applications, and one was satisfied with the installation but “not overly impressed with the designs.”

11.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a DSM offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. See Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III for a description of the TRC test.

Table 111 lists the CY 2025 incentive costs for the Schools and Government Program.

Table 111. CY 2025 Schools and Government Incentive Costs

	Incentive Costs
Schools	\$3,391,643
Government	\$6,537,003
EDA/EDR	\$1,297,488
Total	\$11,226,134

The evaluation team found that the CY 2025 Schools and Government Program was cost-effective (2.29). Table 112 lists the evaluated costs and benefits.

Table 112. CY 2025 Schools and Government Costs and Benefits

Cost and Benefit Category	Total
Costs	
Administration Costs	\$478,091
Delivery Costs	\$7,142,054
Incremental Measure Costs	\$41,076,797
Total Non-Incentive Costs	\$48,696,941
Benefits	
Electricity Benefits (kWh)	\$17,971,810
Capacity Benefits (kW)	\$18,779,609
Gas Benefits	\$5,391,995
Emissions Benefits	\$24,470,233
T&D Benefits (kW)	\$44,910,174
Total TRC Benefits	\$111,523,821
Net TRC Benefits	\$62,826,880
TRC Benefit/Cost Ratio	2.29

11.5. Outcomes

The evaluation team identified the following outcomes and recommendations for improving the Schools and Government Program based on the CY 2025 program evaluation activities. Additional outcomes and recommendations from the cross-cutting process evaluation activities can be found in discussions about those specific research activities, referenced in the *Nonresidential Cross-Cutting Research* section.

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Outcome 1. Reported *ex ante* savings were highly accurate. First-year and annual MMBtu energy realization rates were 100% for the Schools and Government Program in CY 2025, indicating high accuracy in the quantification of estimated energy savings.

Outcome 2. Satisfaction remained high among Schools and Government participants in CY 2025. Participants gave the program an overall satisfaction score of 9.7, which was statistically equivalent to 9.4 in CY 2024. This satisfaction is supported by the high NPS of +96 for CY 2025, suggesting that participants are likely to recommend Focus on Energy to others.

12. Nonresidential Cross-Cutting Research

As part of the CY 2025 nonresidential process evaluation, the evaluation team conducted two research activities spanning multiple nonresidential programs: a survey of Business and Industry and Large Industrial participants and interviews with trade allies across all nonresidential programs. This section describes those research activities and presents related findings.

12.1. Business and Industry and Large Industrial Participant Survey

The evaluation team conducted a participant survey in fall 2025 to assess the experiences of Business and Industry and Large Industrial participants with Focus on Energy communications. This research builds on prior nonresidential process evaluation efforts by examining how participants interact with the program, how they receive and perceive program communications, and where opportunities exist to strengthen engagement.

The research focused on four key areas of communication: channels, frequency, content, and effectiveness. In addition to these key areas, the survey also probed into energy advisor engagement, reasons for current program participation levels, and organizational decision-making processes. The following sections describe the methodology and findings in detail.

12.1.1. Methodology

The evaluation team administered an online survey to the full population of Business and Industry and Large Industrial participants who completed projects during CY 2024 and CY 2025. In October 2025, the team sent the initial survey invitations and follow-up reminders to the full population of documented company contacts. Participants could respond via an online Qualtrics survey and receive a \$25 Tango Rewards electronic gift card for completing the survey. As shown in Table 113, outreach efforts resulted in 105 completed surveys with a response rate of 11%.

Table 113. Participant Sample for Survey

Program	Unique Participants with Email Addresses	Sample Target	Completes	Response Rate	Overall Response Rate
Business and Industry	756	70	80	11%	11%
Large Industrial	166	21	25	15%	

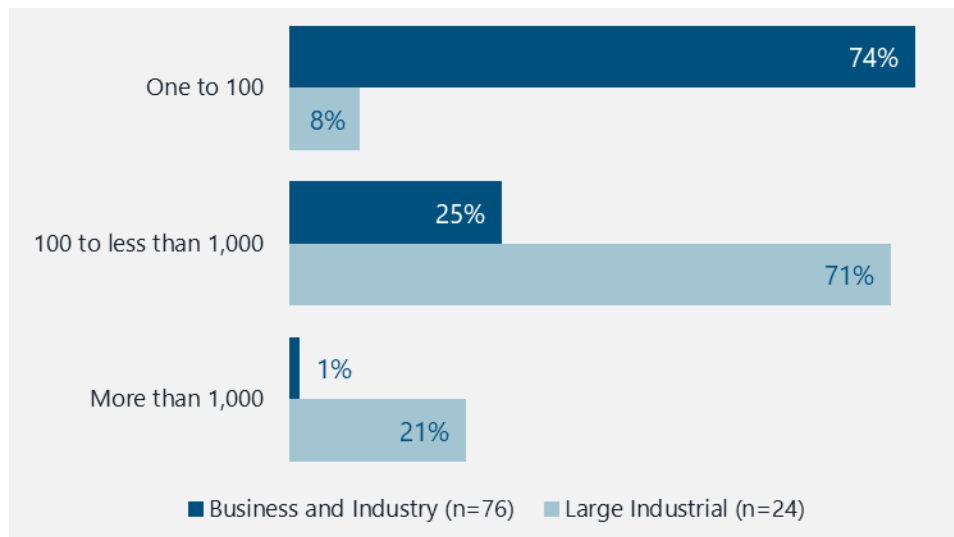
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Respondents included 80 Business and Industry and 25 Large Industrial participants. Since the team distributed the survey to the full population of recent participants rather than a sample, the findings may primarily reflect the experiences of engaged customers across both program segments.

12.1.2. Respondent Characteristics

Respondents represented a wide range of company sizes, with clear differences between the Business and Industry and Large Industrial segments. As shown in Figure 87, just under three-quarters (74%) of Business and Industry respondents reported organizations with fewer than 100 employees, a quarter of Business and Industry respondents reported organizations with 100 to less than 1,000 employees, and only a very small share reported organizations with more than 1,000 employees. In contrast, most Large Industrial respondents were from larger organizations, with the majority at organizations with 100 to less than 1,000 employees.

Figure 87. Number of Employees in Wisconsin

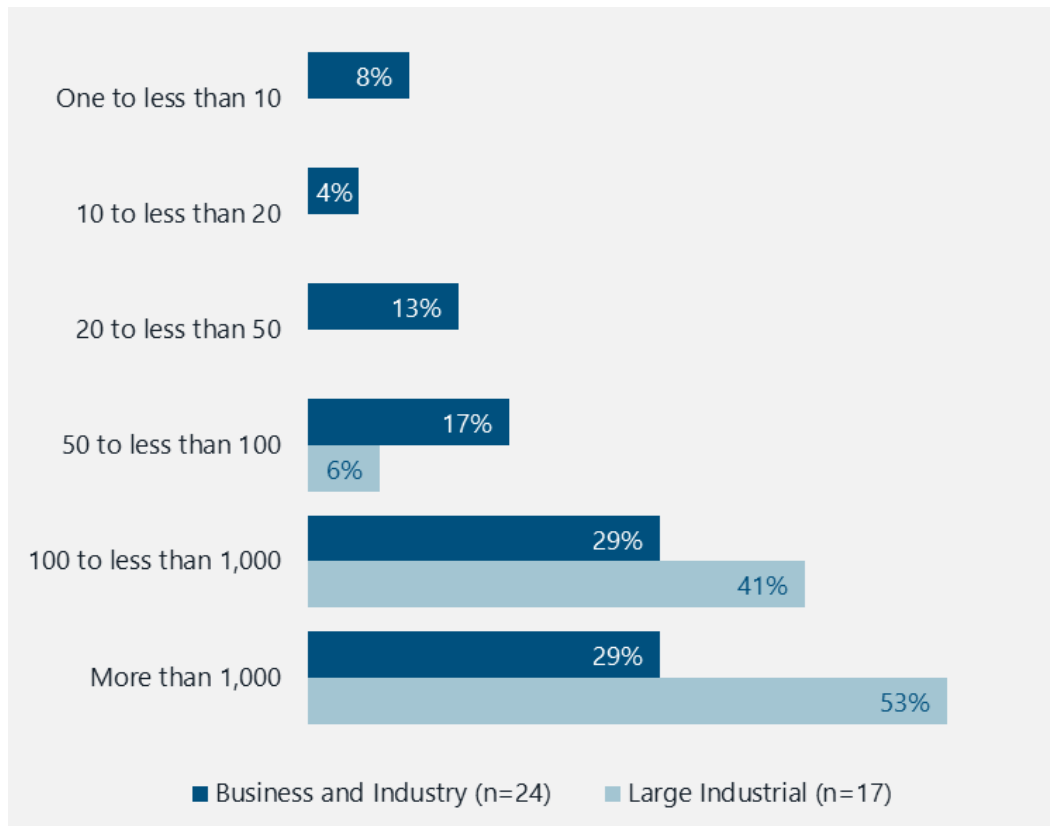


Source: Business and Industry and Large Industrial Participant Survey Question: “How many people does your organization employ in Wisconsin (best guess)?”

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As summarized in Figure 88, Business and Industry respondents were more evenly distributed across size categories outside of Wisconsin. Around one in six (17%) reported 50 to less than 100 employees outside the state, and just over a quarter (29%) reported 100 to less than 1,000 and more than 1,000 employees. In contrast, Large Industrial respondents were heavily concentrated in the largest size categories, with nearly half (41%) reporting 100 to less than 1,000 employees and over half (53%) reporting more than 1,000 employees outside of Wisconsin. Only a small share (6%) of Large Industrial respondents reported fewer than 100 employees outside the state.

Figure 88. Number of Employees Outside of Wisconsin



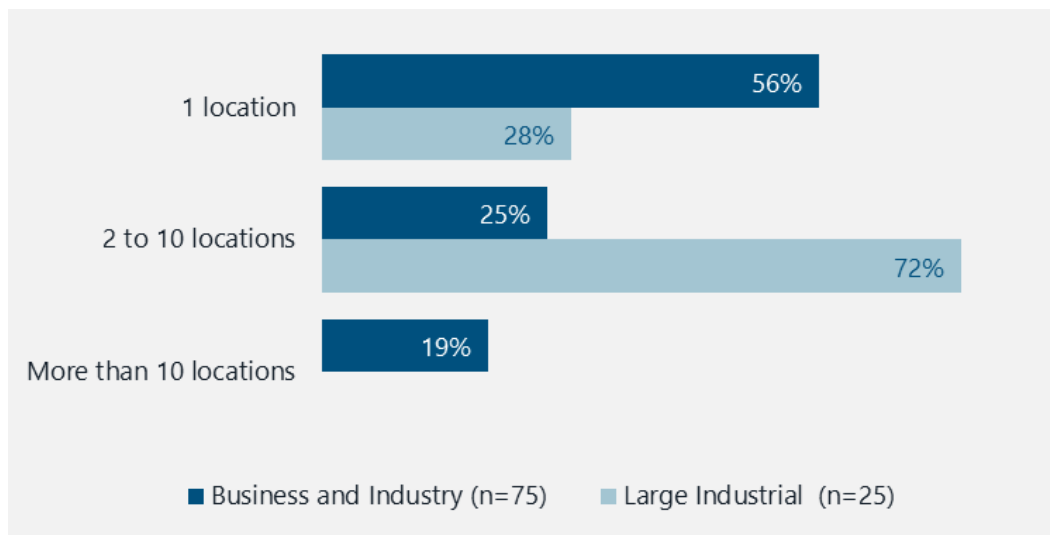
Source: Business and Industry and Large Industrial Participant Survey Question: "How many people does your organization employ outside of Wisconsin (best guess)?"

Base: Respondents with locations outside of Wisconsin

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The survey asked respondents whether their company has locations in and outside of Wisconsin. As summarized in Figure 89, Business and Industry respondents were more likely to operate a single location in Wisconsin, with over half (56%) reporting just one location. A quarter reported two to 10 locations, and nearly one in five reported more than 10 locations in the state. In contrast, nearly three-quarters of Large Industrial respondents (72%) reported two to 10 locations, and just over a quarter (28%) reported a single location. No Large Industrial respondents reported more than 10 locations in Wisconsin.

Figure 89. Locations In Wisconsin

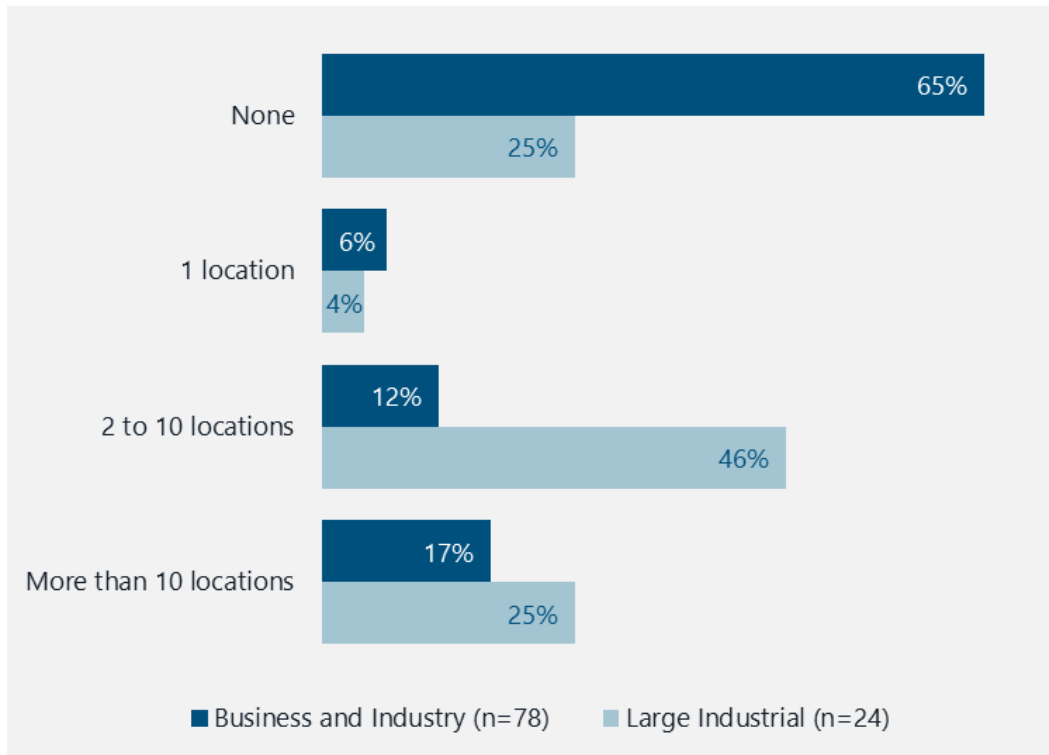


Source: Business and Industry and Large Industrial Participant Survey Question: "How many locations does your organization operate in Wisconsin?"

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In contrast, around one in three (35%) Business and Industry respondents reported their organization operates at least one location *outside* of Wisconsin, with 12% reporting two to 10 locations and 17% reporting more than 10 (Figure 90). Large Industrial respondents were more likely to report locations outside the state, with nearly half (46%) reporting two to 10 locations outside the state and a quarter reporting more than 10.

Figure 90. Locations Outside of Wisconsin

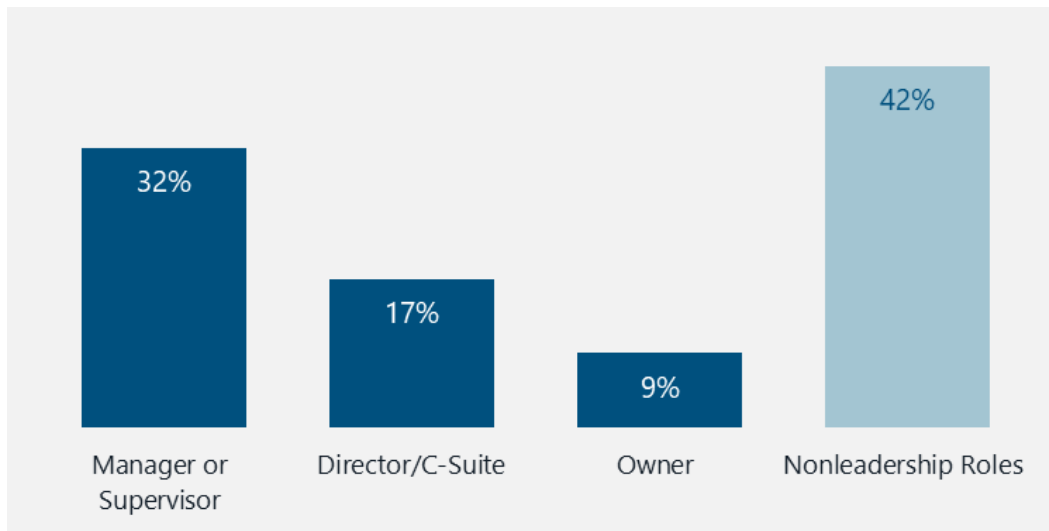


Source: Business and Industry and Large Industrial Participant Survey Question: “How many locations does your organization have outside of Wisconsin?” (n=102)

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The evaluation team sent the survey using the program's company contact email, but the survey also asked respondents to specify their role within their organization. The team categorized responses based on the types of positions represented (Figure 91). Over half of the respondents held leadership roles, including managers/supervisors (32%), directors/C-Suite (17%), and owners (9%). Non-leadership roles varied widely and included positions such as analysts, engineers, office or property coordinators, and maintenance team members.

Figure 91. Respondent Role at Company



Source: Business and Industry and Large Industrial Participant Survey Question: "What is your role within your organization?" (n=105)

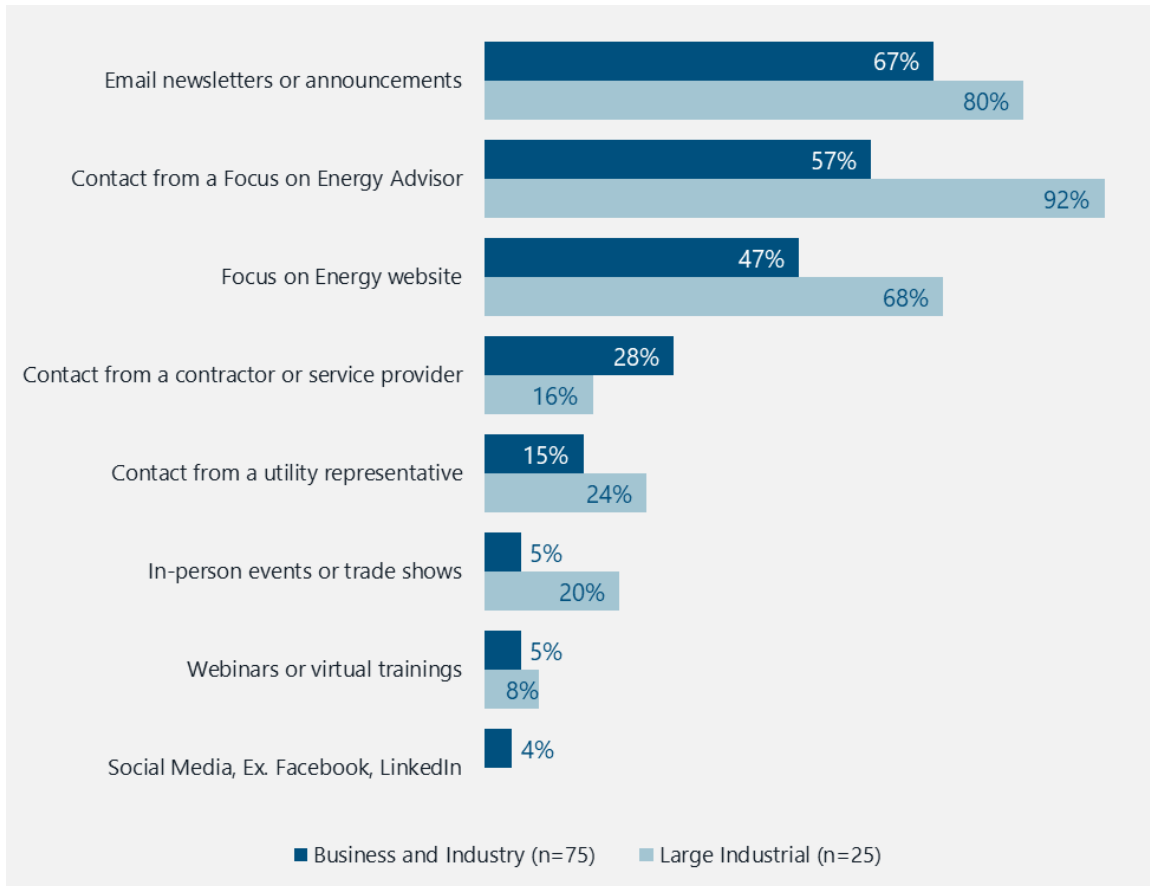
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Communication Channels and Frequency

Channels

Survey findings indicate that most participants receive Focus on Energy communications through multiple channels. As shown in Figure 92, email newsletters or announcements, energy advisors, and the Focus on Energy website were the most commonly reported communication sources among both Business and Industry and Large Industrial participants.

Figure 92. Communications Channels by Segment

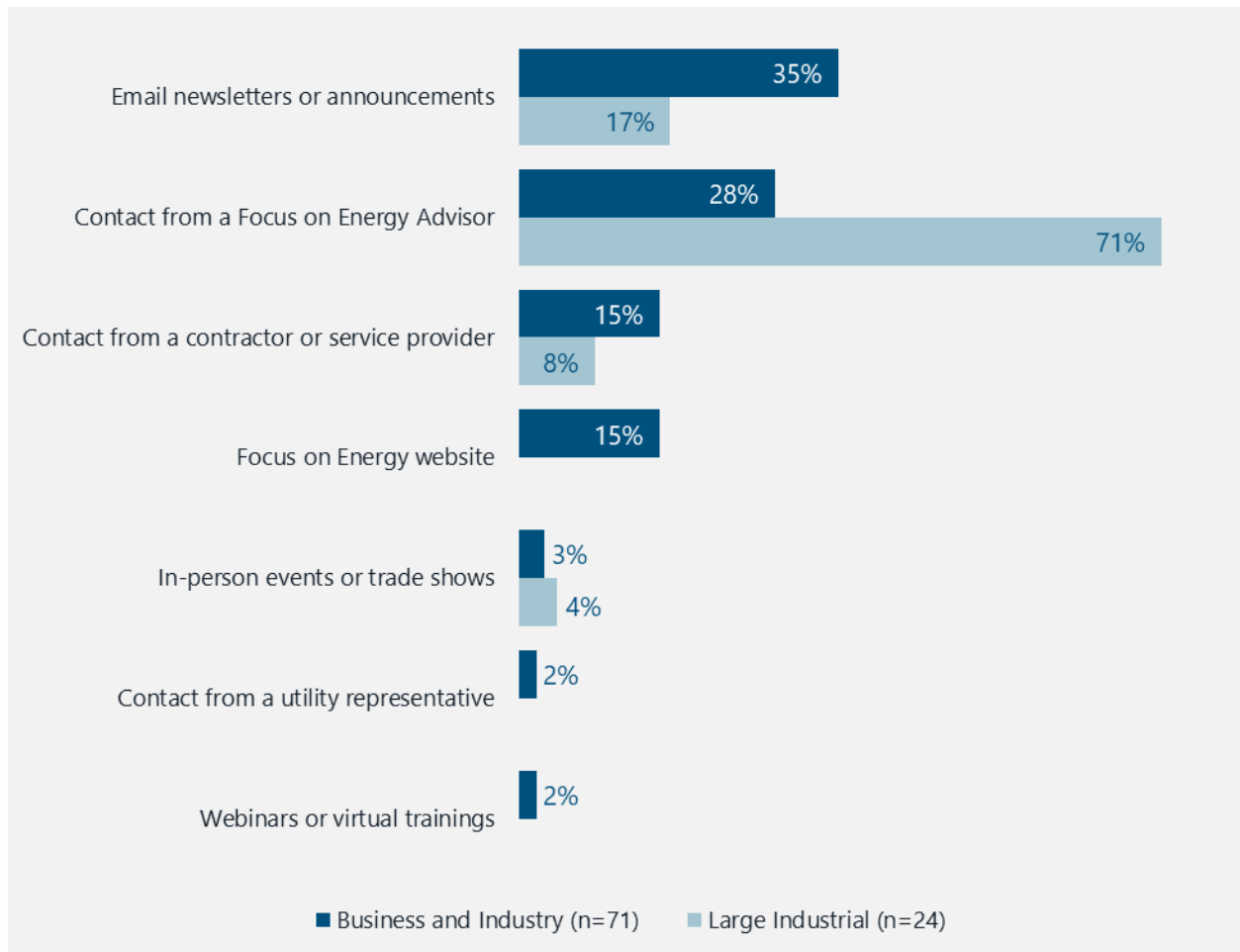


Source: Business and Industry and Large Industrial Participant Survey Question: "Please select all the ways you receive communication from Focus on Energy." Percentages do not add up to 100% because multiple responses were allowed.

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The survey asked about the most recent communication received from Focus on Energy (Figure 93); 71% of Large Industrial respondents reported that their energy advisor was their most recent point of contact, compared to only 28% of Business and Industry respondents. Business and Industry participants were more likely to cite email or other digital communications as their most recent interaction.

Figure 93. Most Recent Communication Channel

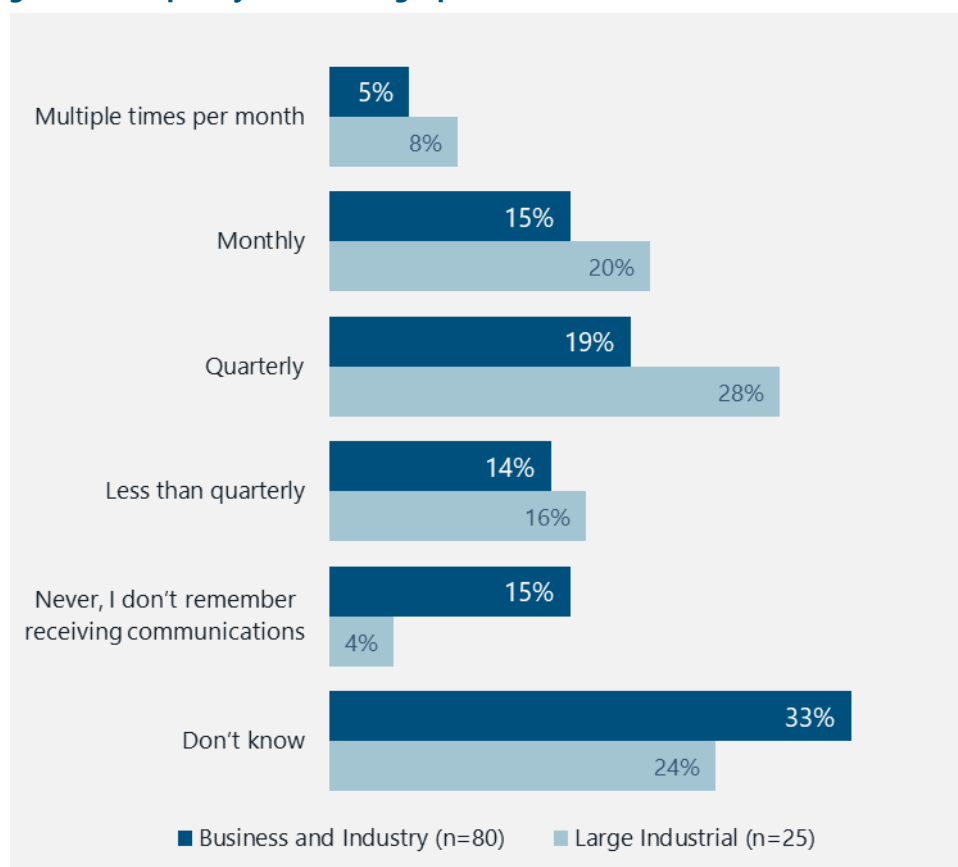


Source: Business and Industry and Large Industrial Participant Survey Question: "Indicate which type of communication you received most recently."

Frequency

When asked how often they receive communication from Focus on Energy, the largest share of Business and Industry (33%) did not know (Figure 94). This category ranked highest among Business and Industry respondents; by comparison, it ranked second-highest among Large Industrial respondents (24%). Among respondents who recalled the frequency of communications, most (28% of Large Industrial and 19% of Business and Industry) reported receiving them quarterly.

Figure 94. Frequency of Receiving Updates or Information from Focus on Energy



Source: Business and Industry and Large Industrial Participant Survey Question: "How often do you currently receive updates or information from Focus on Energy?"

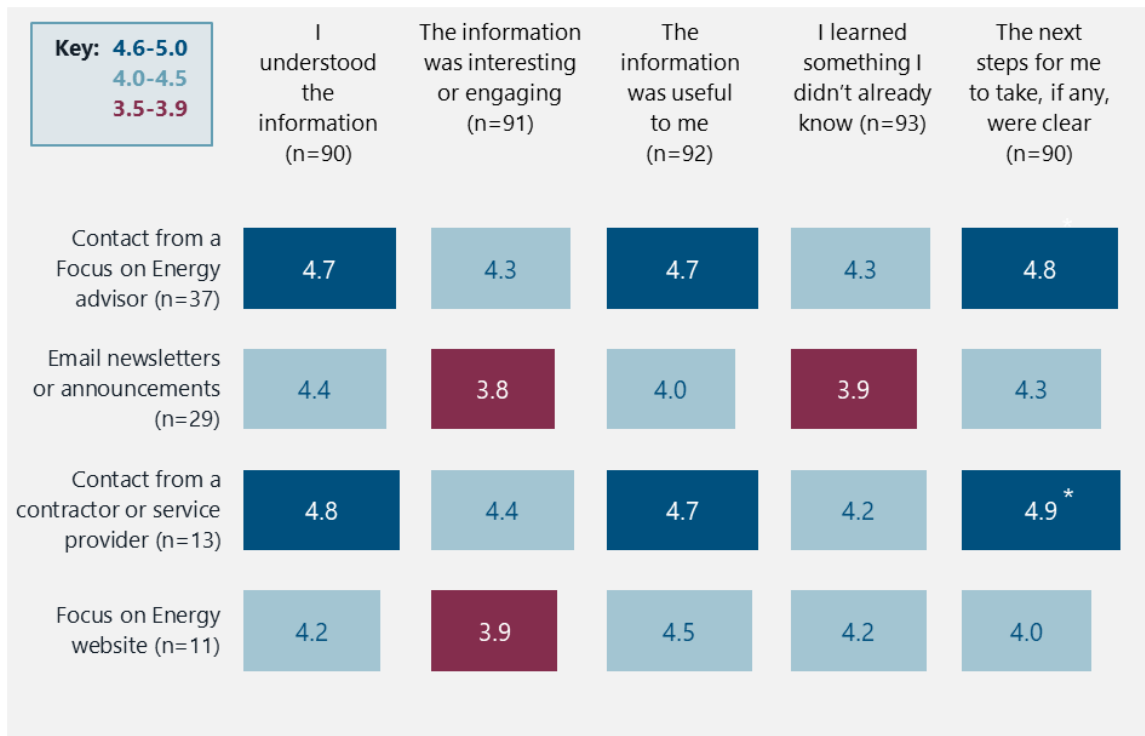
Satisfaction with the frequency of program communications was high among those who recalled it. Most respondents (90% of Business and Industry, 89% of Large Industrial) who recalled communications reported that the frequency was "just right." Approximately the same share of respondents across segments (10% Business and Industry, 11% Large Industrial) reported interest in receiving more communication, reporting that communication was "not frequent enough." No respondents who recalled the frequency of communication said they had received too many communications from Focus on Energy.

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Communication Effectiveness

Participants were asked to rate the effectiveness of up to three Focus on Energy communication channels. Respondents provided feedback on communications from the energy advisor, email, contractor, and website. As shown in Figure 95, respondents generally agreed that communications were clear, relevant, and useful, with average ratings falling in the upper ranges of the five-point agreement scale.

Figure 95. Communication Effectiveness Ratings by Channel



Source: Business and Industry and Large Industrial Participant Survey Question: “To what extent do you agree or disagree with the following statements about the most recent communication you received?”

Note: Respondents were asked to rate up to three of their most recent communications on a 5-point scale from 1 (*completely disagree*) to 5 (*completely agree*). Channels with fewer than 10 respondents are not displayed. *Indicates statistical significance.

Respondents gave the highest ratings to contact from an energy advisor and contact from a contractor or service provider across most dimensions, especially in providing understandable and useful information. Email newsletters and the Focus on Energy website received somewhat lower ratings, though they were still generally high. Respondents scored email newsletters and the website the lowest on interesting and engaging information (3.8 and 3.9, respectively). The newsletter had the lowest score for “I learned something I didn’t already know” at 3.9.

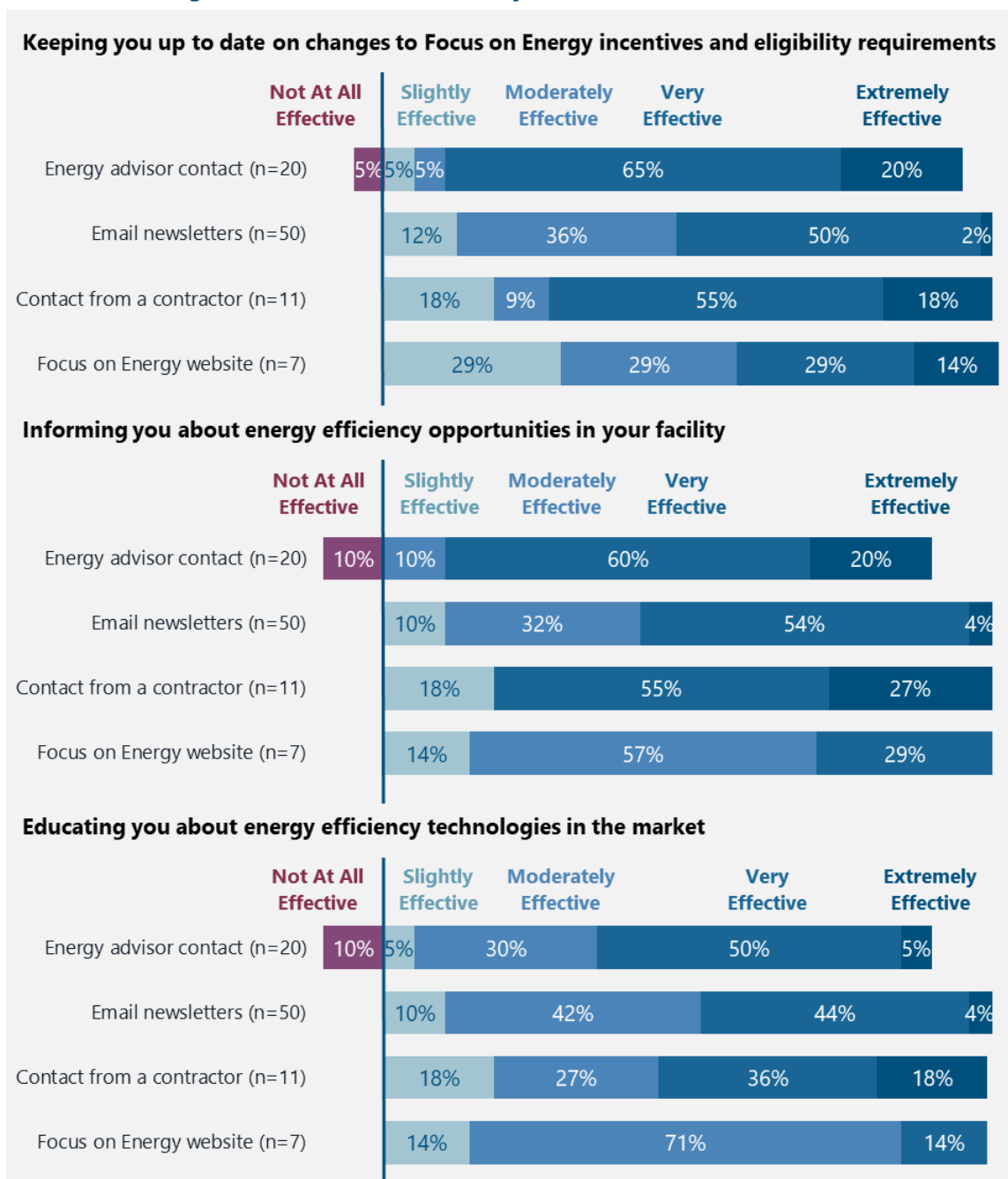
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Qualitative feedback through open-ended responses reinforced these findings. Participants described the program as easy to understand and appreciated the clarity and practicality of communications. Several Large Industrial respondents emphasized the importance of having a knowledgeable energy advisor who could engage at a technical level, with one respondent noting that their advisor was “knowledgeable, personal, and able to keep pace with our engineers.”

The survey also asked respondents to rate the effectiveness of different communication channels across three specific categories: keeping participants up to date on changes to Focus on Energy incentives and eligibility requirements, informing participants about energy efficiency opportunities in their facility, and educating participants about energy efficiency technologies in the market. Respondents rated each channel they had experience with on a five-point scale ranging from *extremely effective* to *not at all effective*. Responses depicted some variation in communication effectiveness ratings across Business and Industry and Large Industrial segments for these three communication purposes.

As shown in Figure 96, Business and Industry participants rated the highest communication effectiveness across the two main channels: energy advisors and contractors. Respondents rated energy advisor outreach and contractor contact similarly for keeping them up to date on program changes and eligibility requirements, with both channels receiving high combined *extremely effective* and *very effective* ratings (energy advisors at 85% and contractors at 73%). However, most respondents rated the contractors highest for keeping them informed about facility-specific efficiency opportunities and educating them on market technologies (27% and 18%, respectively), while energy advisors also received strong, *extremely effective* ratings for keeping participants up to date on program changes and informing them about facility opportunities (both at 20%).

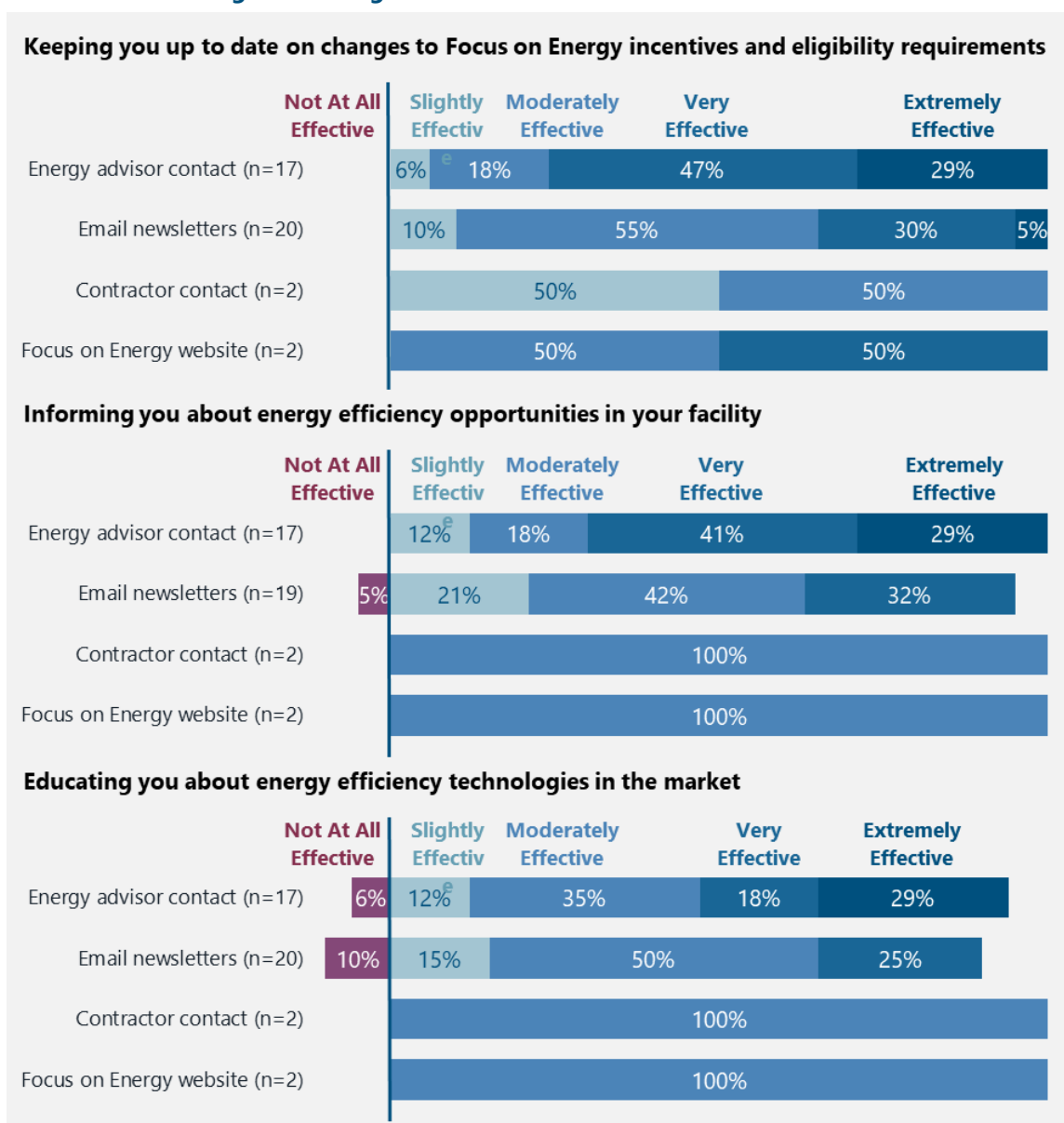
Figure 96. Business and Industry Communication Effectiveness



Source: Business and Industry and Large Industrial Participant Survey Question: “Please rate the effectiveness of each communication channel that Focus on Energy uses to reach you on a scale from one to five, with one being not at all effective and five being extremely effective.” (n=88). Note: All respondents were asked to rate up to three communication methods. If respondents indicated they received communication through three or more channels, the survey instrument ensured that email newsletters (if selected) were always included among the channels rated for effectiveness. The remaining one to two communication methods were randomly selected from the respondent’s other indicated channels. This approach balanced comprehensiveness with survey length while ensuring consistent evaluation of the newsletter channel, a recent offering in Focus’s communication portfolio.

Large Industrial participants ranked energy advisors as the most effective channel for keeping respondents up to date on program changes and eligibility requirements, with 47% rating them *very effective* and 29% rating them *extremely effective* (Figure 97). For informing respondents about facility-specific efficiency opportunities and educating them about energy efficiency technologies in the market, email newsletters performed similarly to energy advisors: 42% rated email newsletters very effective and 32% extremely effective for facility opportunities, compared to 41% and 29% for energy advisors; and 25% rated email newsletters extremely effective for educating about technologies, compared to 29% for energy advisors.

Figure 97. Large Industrial Communication Effectiveness

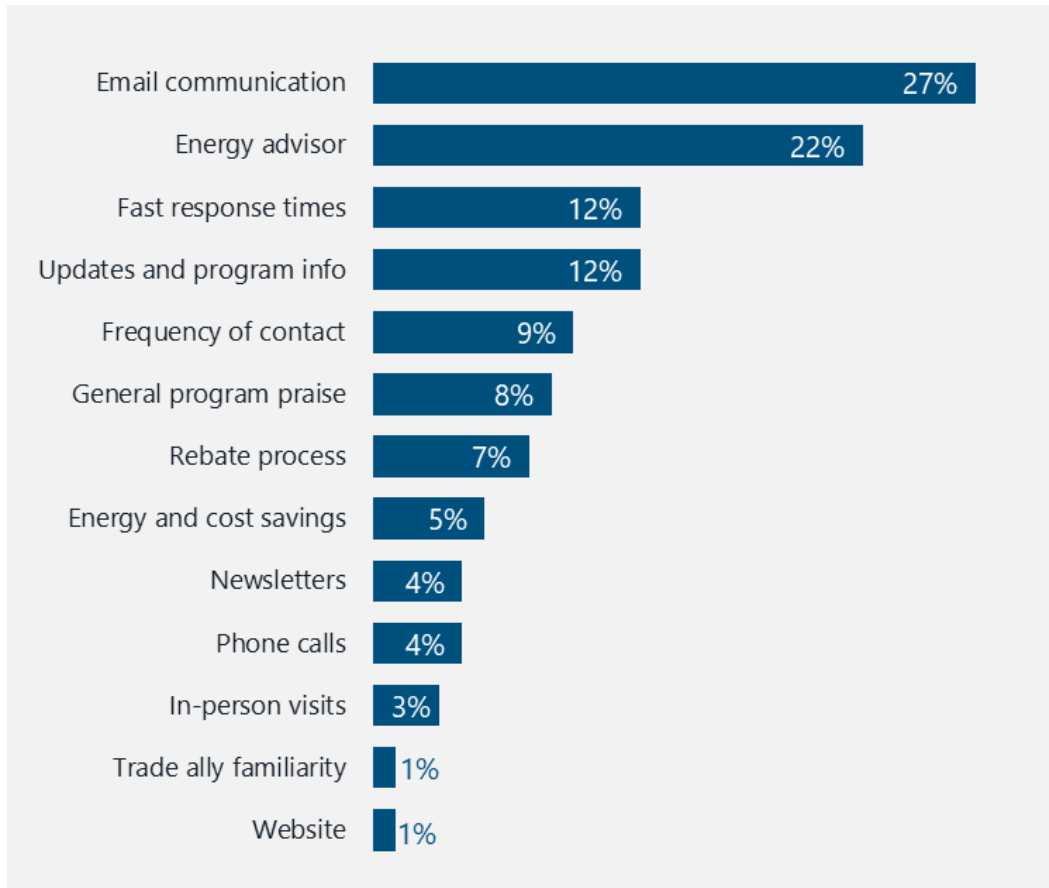


Source: Business and Industry and Large Industrial Participant Survey Question: "Please rate the effectiveness of each communication channel that Focus on Energy uses to reach you on a scale from one to five, with one being not at all effective and five being extremely effective." (n=41)

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The survey asked respondents to describe what was generally working well with the way Focus currently communicates with their organization in an open-ended question. The team manually coded responses into categories, shown in Figure 98. Email communication (27%) and energy advisor interactions (22%) were the most prominent themes. Note that these categories were coded as mutually exclusive: any positive mention of an energy advisor was consolidated under the energy advisor category, while email communication referred strictly to general correspondence where an energy advisor was not specified. Participants also reported other significant factors contributing, including fast response times (12%), updates and program info (12%), and the frequency of contact (9%).

Figure 98. Things Working Well with Current Communications from Focus on Energy



Source: Business and Industry and Large Industrial Participant Survey Question: “What’s working well about the way Focus on Energy communicates with your organization?” (n=68). Percentages do not add up to 100% because multiple responses were allowed. (Open-ended, recoded)

CADMUS

Participants were also asked an open-ended question to share how Focus on Energy could improve the way they communicate with their organizations (Figure 99). More than half of the respondents (56%) reported that no improvements were needed. Among those who identified areas for improvement, the most common request centered on communication frequency (11% wanted more frequent communication), while smaller shares requested more program information or content (6%), different communication channels (6%), more proactive outreach (5%), and process improvements (5%). Respondents interested in more proactive outreach suggested more regular in-person engagement. For example, one recommended: "Plan a visit every so often to look at what has changed and provide feedback on what can be done going forward." Finally, those citing process improvements emphasized the need for more timely follow-up, with one noting, "Better follow up in a timely manner, them reaching out to us, not the company having to follow up over the course of one year to get answers." Additional responses categorized as "other" included emphasizing the value of savings messaging in marketing and energy advisor engagement with utilities to streamline communication effectiveness.

"Email is nice, but emails get buried in the other emails... An occasional physical newsletter would be handy; they are harder to lose and easy to share."
-Large Industrial Participant

Figure 99. How Current Communications from Focus on Energy Could Be Improved

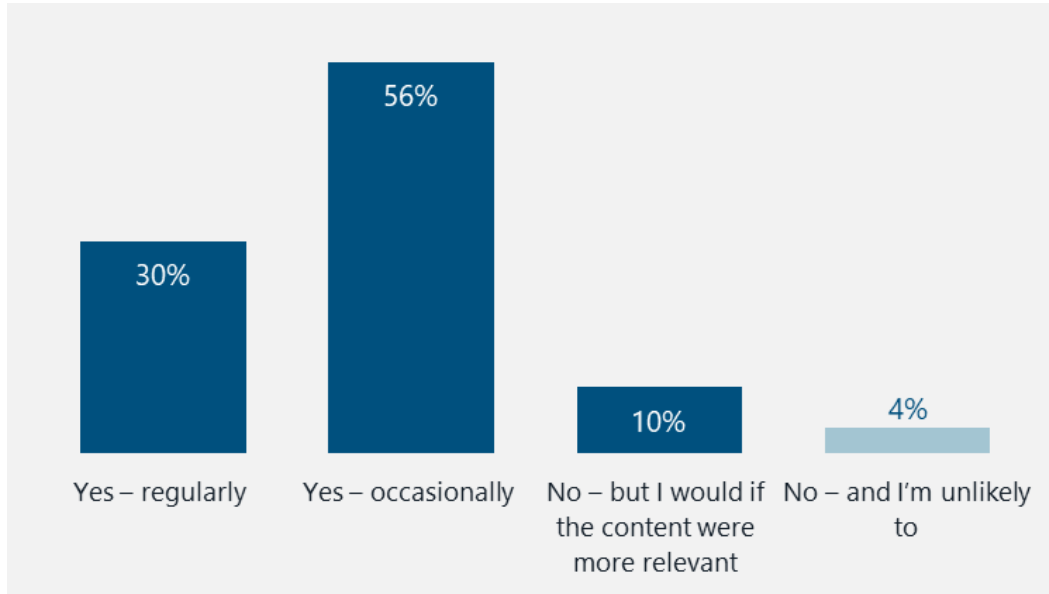


Source: Business and Industry and Large Industrial Participant Survey Question: "What could be improved about the way Focus on Energy communicates with you?" (n=82) (Open-ended, recoded)

Use of Program Communications

Most survey respondents reported they regularly (30%) or occasionally (56%) share Focus on Energy information with colleagues within their organizations (Figure 100).

Figure 100. Sharing of Focus Communications



Source: Business and Industry and Large Industrial Participant Survey Question: “Have you ever shared information from Focus on Energy with others in your organization (e.g., finance, operations, facilities, leadership)?” (n=105)

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When asked what types of information would be most valuable to their organization (out of a prefilled list in the survey), participants emphasized practical resources like energy saving calculators (60%) and application or deadline reminders (48%), shown in Figure 101.

Figure 101. Valuable Information



Source: Business and Industry and Large Industrial Participant Survey Question: “What kinds of information from Focus on Energy are most valuable to your organization?” (n=105, 189 responses). Percentages do not add up to 100% because multiple responses were allowed.

Feedback on Materials

Survey respondents were asked about various communications from Focus on Energy.

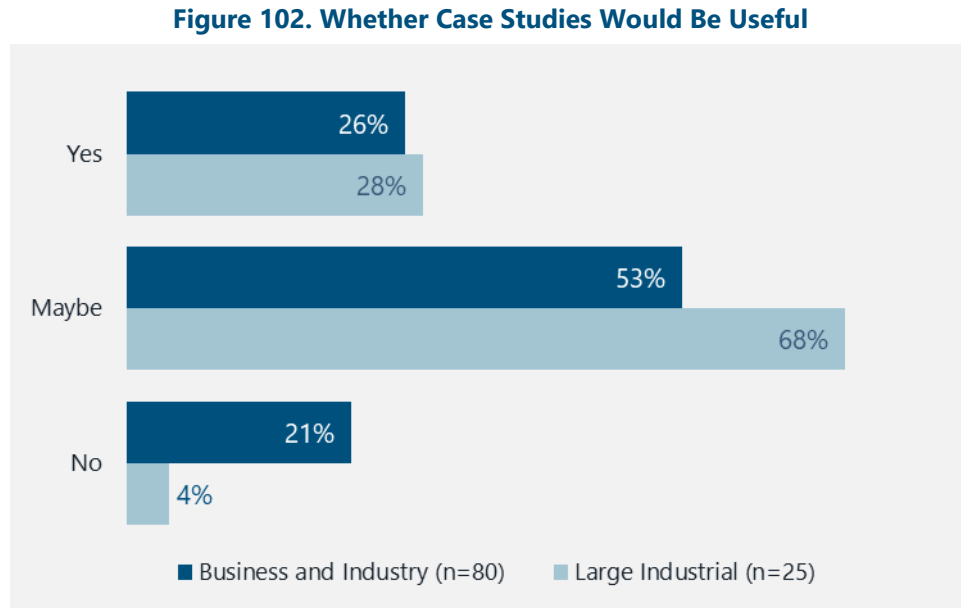
LinkedIn

Only 27% of survey respondents reported regularly using LinkedIn (nine Large Industrial, 19 Business and Industry). Of those respondents, awareness of Focus on Energy’s LinkedIn content was low across both segments: only eight respondents (five Business and Industry, three Large Industrial) reported seeing Focus on Energy content on LinkedIn.

Among the small number of respondents (n=8) who had seen Focus on Energy content on LinkedIn, their opinions of its usefulness varied: two found it *very useful*, two *somewhat useful*, and the remaining three reported it was *neither useful nor not useful*.

Case Studies

Participants reported mixed views on the usefulness of case studies. As shown in Figure 102, most respondents were uncertain about whether case studies would be useful, with a higher percentage of Business and Industry participants (21%) reporting that case studies would not be useful.

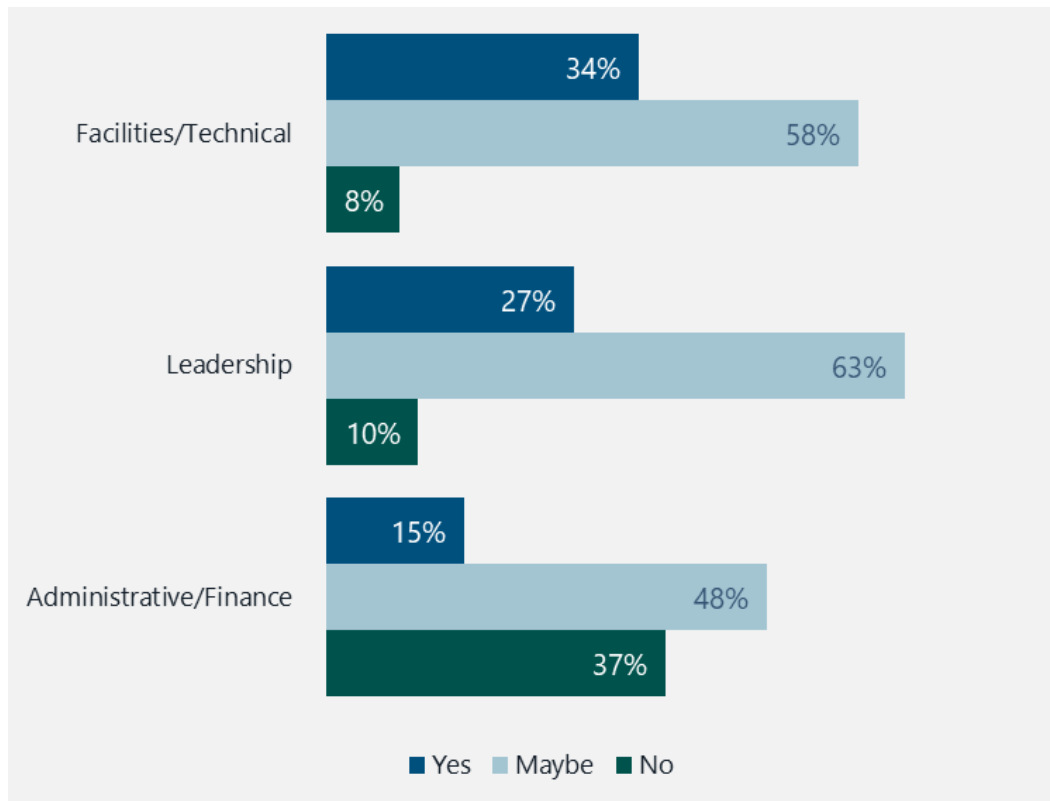


Source: Business and Industry and Large Industrial Participant Survey Question: “Focus on Energy publishes numerous case studies throughout the year to highlight how organizations like yours have benefited from using the programs. Would those types of case studies be useful to you?”

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Responses to whether case studies would be useful were also looked at in relation to the self-reported role of the respondent; those in facilities/technical roles (e.g., building supervisor) were more likely to report that case studies could be of use to them—34% compared to 27% of leadership positions and 15% of administrative or finance roles (Figure 103).

Figure 103. Whether Case Studies Would Be Useful, by Respondent Role

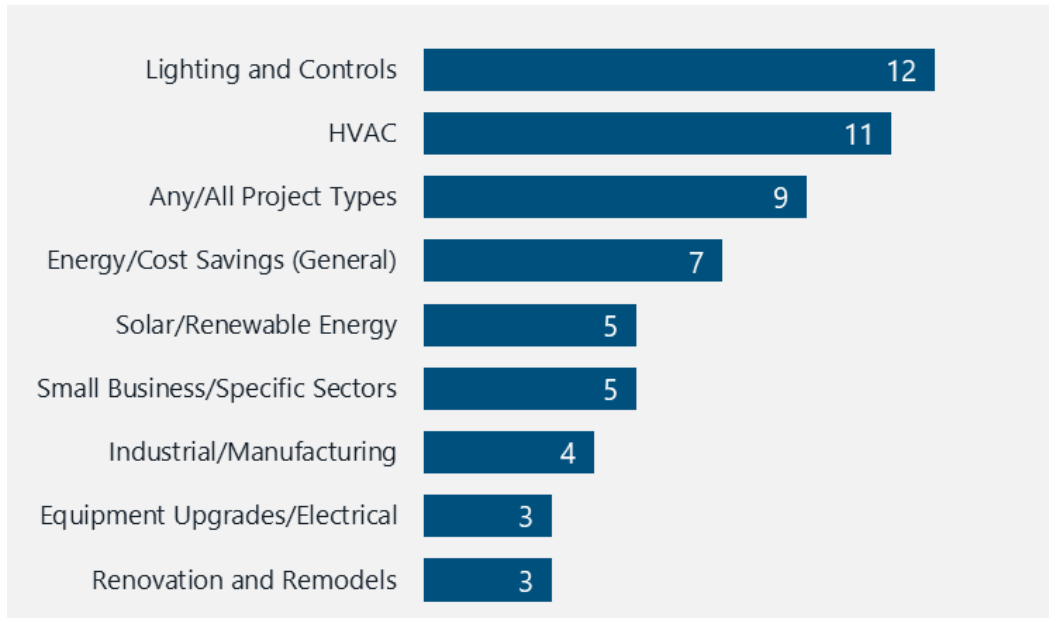


Source: Business and Industry and Large Industrial Participant Survey Question: “Focus on Energy publishes numerous case studies throughout the year to highlight how organizations like yours have benefited from using the programs. Would those types of case studies be useful to you?” (n=105)

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Respondents who said case studies would or might be helpful (answered yes or maybe) were asked what types of projects they would like to see featured as case studies. As shown in Figure 104, most respondents wanted lighting and controls projects (12 respondents), followed by HVAC projects (11 respondents).

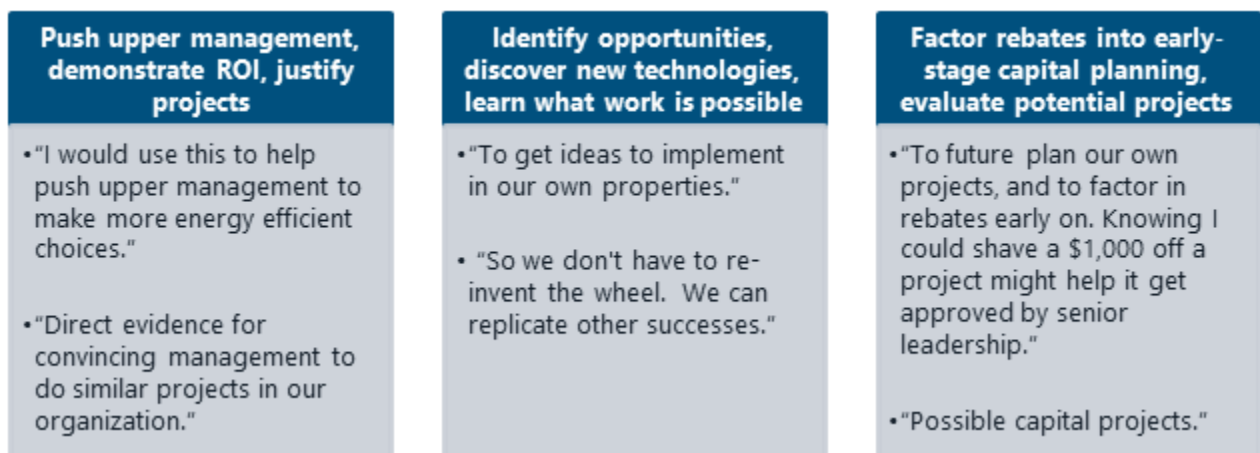
Figure 104. Desired Case Studies



Source: Business and Industry and Large Industrial Participant Survey Question: “What types of projects would you like to see featured as case studies?” (n=59) (Open-ended, recoded)

Some participants who said case studies could be useful to their organizations described plans to apply them in high-impact ways in open-ended survey responses (see Figure 105).

Figure 105. Case Study Applications



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Newsletters

Respondents were asked about the Focus on Energy newsletter. Those who received it were asked what additional content they would like to see, while those who had not received it were asked what they would want in a newsletter. Most recipients (24 of 38 respondents) said no changes were needed (Table 114). Among those who offered suggestions, several mentioned case studies. One Large Industrial respondent explained, “Examples of energy projects completed in other facilities. We struggle to come up with new ideas.” Others wanted clearer updates on programs and incentives, particularly given funding uncertainty. As one Business and Industry respondent said, “It would be good to know what will continue in the future. This would help in budgets and business planning.” Respondents also requested more information on new technologies and energy-saving opportunities, including building-use concepts and cost-saving construction ideas tied to grants. One Business and Industry respondent specifically asked for content tailored to small and medium-sized facilities, focusing on affordable, do-it-yourself solutions that do not require contractors. Among respondents who did not recall receiving the newsletter, the most frequently requested content was updates on programs and incentives.

Table 114. Suggestions for Newsletter Content

Program	Recipients	Nonrecipients
No additions needed	24	N/A
Case studies	5	2
Program and incentive information and updates	4	12
Technologies	3	7
Energy savings opportunities and ideas	2	5

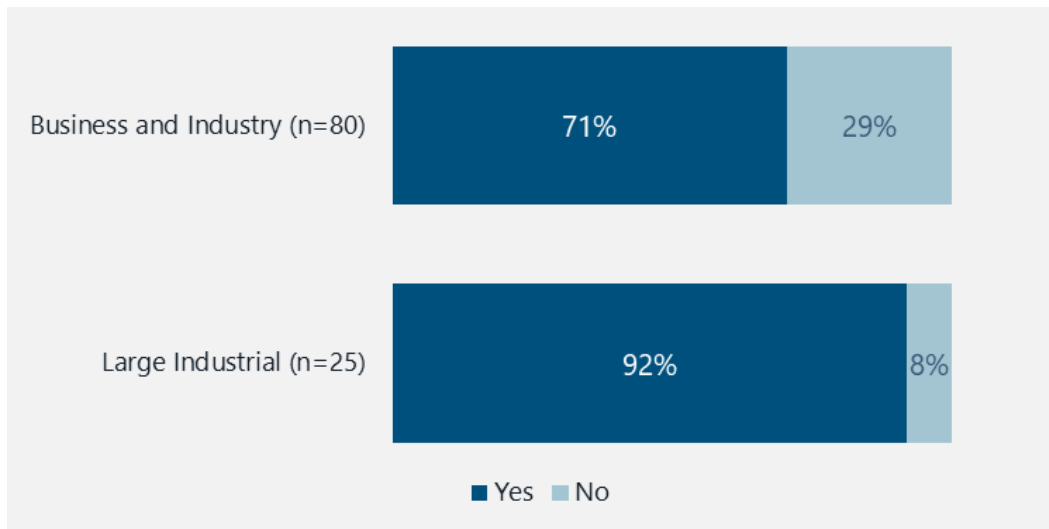
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Energy Advisor Engagement

Energy Advisor Outreach

As shown in Figure 106, most respondents reported working with an energy advisor, but engagement differed by segment. Most respondents reported working with an energy advisor (92% of Large Industrial participants and 71% of Business and Industry participants).

Figure 106. Worked with an Energy Advisor Before

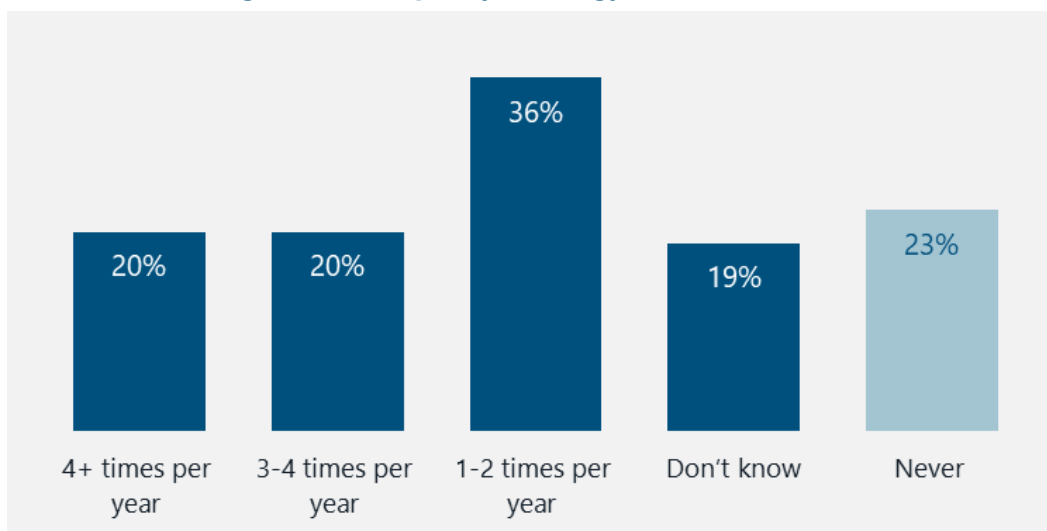


Source: Business and Industry and Large Industrial Participant Survey Question: Focus on Energy has dedicated Energy Advisors who provide one-on-one support to help customers identify energy efficiency opportunities and navigate Focus on Energy programs. Have you worked with a Focus on Energy Advisor?" (n=105)

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Survey respondents were also asked how often they hear from an energy advisor (versus working with them). The frequency of energy advisor contact varied, with most respondents (36%) reporting they heard from an energy advisor one to two times a year (Figure 107). Approximately 23% of respondents—all Business and Industry participants—reported never hearing from an energy advisor. An additional 17 respondents reported receiving energy advisor outreach but did not know its frequency; these respondents are excluded.

Figure 107. Frequency of Energy Advisor Outreach



Source: Business and Industry and Large Industrial Participant Survey Question: “How often do you hear from a Focus on Energy Advisor?” (n=88)

The frequency of energy advisor outreach correlated to company size, as those who heard most frequently from an energy advisor (at least three times a year) were most likely to be companies with more than 100 employees (Table 115). Respondents from smaller companies, such as those with fewer than 100 employees, were more likely to have never heard from an energy advisor (50% from companies with fewer than 10 employees and 40% from companies with 10 to 99 employees). As noted above, this reflects the prioritization of larger customers for energy advisor outreach.

Table 115. Frequency of Energy Advisor Outreach by Company Size

	<10 Employees	10-99 Employees	≥100 Employees
Never (n=20)	50%	40%	10%
1-2 times per year (n=32)	31%	31%	38%
3-4 times per year (n=16)	13%	19%	69%
>4 times per year (n=16)	0%	31%	69%

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Among the 20 Business and Industry participants who reported never hearing from an energy advisor, and the 17 overall participants who selected *don't know* when asked about contact frequency, over a quarter (27%) said it would be helpful to have regular contact from an energy advisor. However, 43% said it would not be helpful to have contact, and another 30% answered *don't know*.

Respondents who engage with energy advisors regularly reported high satisfaction with these relationships. The majority (85%) rated their satisfaction as *extremely or very satisfied*, and 15% were moderately or slightly satisfied. None of the respondents who had contact with an energy advisor reported being *not at all satisfied*.

Respondents highlighted energy advisors' helpfulness in navigating the rebate process and identifying opportunities. One Business and Industry respondent noted, "They help finalize the details of the rebate submittals and offer explanations of which products to choose to obtain rebates and higher efficiency." Another shared, "They made sure we have the right setup for our build in order to [be] energy efficient and get a monetary incentive." Large Industrial respondents valued the transparency and ongoing communication, with one stating, "They understand what can and cannot be done within their guidelines and are up front with which projects can and should be considered, more importantly, what not to waste any more time on."

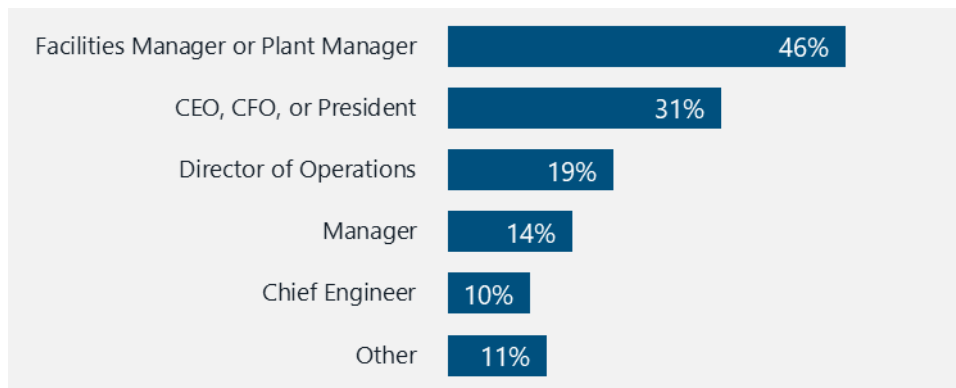
"They [energy advisors] understand what can and cannot be done within their guidelines and are up front with which projects can and should be considered, more importantly, what not to waste any more time on."
-Large Industrial Participant

Those who reported they were *moderately or slightly satisfied* with their energy advisor relationships were asked how those interactions could be improved. Recommendations centered on more frequent, proactive outreach and specific content requests. Among their suggestions, respondents noted the need for more general information on Focus offerings and project opportunities (three respondents), with one explaining, "[a] simple list of project categories and potential rebate of each." Another three requested more proactive outreach to customers, with one suggesting that the energy advisor send "more frequent personal emails." One respondent wanted more communication on active rebate applications, and another on project closing, specifically requesting "closing the loop with the GC and subs after the project is complete, and the checks have gone out."

Engaging Organizations in Decision-Making

Survey respondents reported that decision-making for energy efficiency projects typically involves both operations staff and organizational leadership. As shown in Figure 108, respondents said that early engagement often begins within operations or facilities teams, such as through facilities or plant managers, with leadership roles, such as the CEO or president, following such decisions.

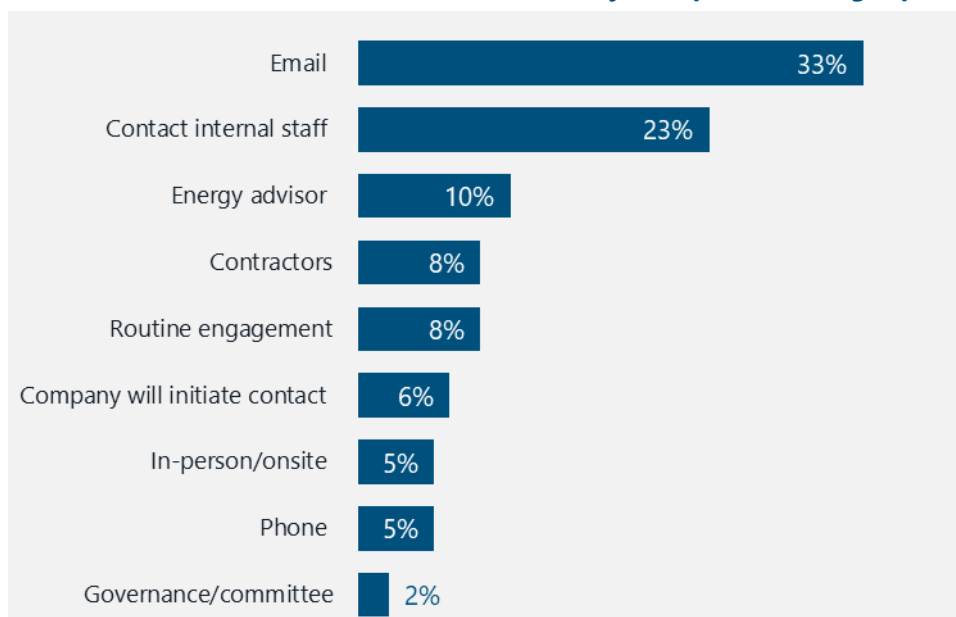
Figure 108. Titles of Those Involved in Early-Stage Decisions about Capital Project Planning and Design



Source: Business and Industry and Large Industrial Participant Survey Question: “What are the job titles of the people in your organization that are typically involved in early-stage decisions about capital project planning and project design?” (n=105). Percentages do not add up to 100% because multiple responses were allowed.

When asked how Focus on Energy should connect with organizational decision-makers early in the capital planning process, most respondents preferred email (33%; Figure 109). Nearly one-fifth of respondents (23%) said that Focus should contact other staff members within their organization, naming certain roles (e.g., “Contact the Sustainability and Energy team”). This was followed by energy advisor contact (10%), contractor outreach (8%), and routine engagement (8%).

Figure 109. How to Connect with Decision Makers Early in Capital Planning (open-ended)

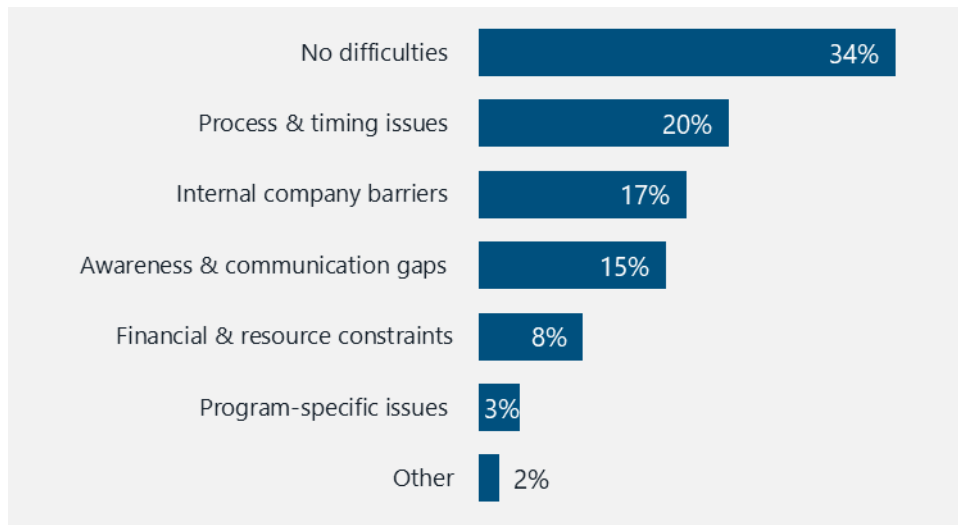


Source: Business and Industry and Large Industrial Participant Survey Question: “What’s the best way for Focus on Energy to connect with them early in the capital planning process?” (n=61)

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When asked what makes it difficult to bring Focus on Energy into their organization's capital planning process, nearly one-quarter of respondents (34%) reported no difficulties (Figure 110). Among those who identified barriers, most cited process and timing issues (20%), followed by internal company barriers, such as ROI requirements or approval processes (17%), and awareness and communication gaps (15%). A smaller share of respondents cited financial and resource constraints (9%) and program-specific issues (3%).

Figure 110. Difficulties in Incorporating Focus into Capital Planning



Source: Business and Industry and Large Industrial Participant Survey Question: "What, if anything, makes it difficult to bring Focus on Energy into your organization's capital planning process?" (n=59)

12.1.3. Outcomes and Recommendations

Informed by findings from the Business and Industry and Large Industrial participant surveys, these recommendations focus on strengthening the effectiveness of energy advisor engagement and refining communication strategies to better support participants' decision-making.

Outcome 1. Participants are satisfied with Focus on Energy communications and find communications effective across channels. Most participants reported satisfaction with the frequency and variety of communication, suggesting broad program reach. They highly rated most channels for effectiveness, rating energy advisors and contractors the highest for clarity of next steps. Participants also reported regularly sharing Focus materials internally, which indicates that the content is valuable enough to pass along.

Outcome 2. Business and Industry participants find contractors slightly more helpful than energy advisors in educating them about energy efficiency technology and informing them of energy efficiency opportunities. Respondents who engaged with an energy advisor were highly satisfied with their interactions. They valued energy advisors for their expertise, responsiveness, and guidance through the rebate process. Large Industrial participants frequently reported that their energy advisor was their most recent touchpoint. However, Business and Industry participants rated contractors slightly higher than energy advisors in educating them about energy efficiency technology and informing them of energy efficiency opportunities in their facilities. This aligns with the programs' current outreach strategy, as Business and Industry emphasizes contractor education to expand program reach, while Large Industrial relies more heavily on direct energy advisor engagement with a smaller set of accounts. Some Business and Industry survey respondents reported no energy advisor contact but expressed interest in such outreach.

Recommendation 2. Consider implementing proactive, but low-effort outreach to past Business and Industry participants for whom the program already has contact information, but who currently lack energy advisor relationships. This outreach can be relatively light-touch, given that Business and Industry customers already respond well to email communications and interact with multiple channels. A strategy of one or two generic annual touchpoints per past or existing customer, describing program updates and incentive offerings, delivered primarily via email, could substantially expand energy advisor reach without overwhelming staff resources. Focus the outreach on ensuring customers know they have an assigned energy advisor available to support them, understand how to access their assistance, and receive proactive alerts when new incentive opportunities arise that match their company profile. Given the high satisfaction scores among participants who work with energy advisors, growing these relationships could be well received.

In addition, to expand program reach, consider pursuing joint marketing efforts with utilities, which have visibility into their customer bases and service territories and are better positioned to identify and reach eligible customers. Co-branded email campaigns, bill inserts, or utility newsletter features could introduce customers to program offerings and inform them of available energy advisor support.

Outcome 3. There is limited engagement on LinkedIn among existing program participants.

A relatively small share of respondents reported regularly using LinkedIn, and within those users, awareness of Focus on Energy's LinkedIn content was low. Among the small number of respondents who had seen Focus on Energy content on LinkedIn, usefulness ratings were mixed, ranging from very useful to neutral. These findings suggest that LinkedIn is currently used as a lower-impact channel to reach existing program participants. However, the survey measured only current participant awareness and use, not LinkedIn's effectiveness for other potential objectives such as reaching nonparticipants, engaging trade allies, or building broader brand awareness.

Recommendation 3. Clarifying the strategic objectives for LinkedIn and establishing appropriate metrics aligned with those goals would enable more informed use of this channel. If LinkedIn is intended primarily to communicate with existing participants, the current approach and resource investment may warrant reconsideration. If LinkedIn serves to generate prospects and reach nonparticipants, campaign success metrics might be better aligned with those objectives rather than existing participant engagement. This clarification could support resource allocation across communication channels by clearly defining purposes and realistic outcomes.

Outcome 4. Participants share Focus materials internally. Most respondents reported regularly or occasionally sharing Focus on Energy information with colleagues within their organizations, indicating that program communications reach beyond the initial recipient. When asked what types of information would be most valuable, participants emphasized practical resources such as energy-saving calculators and application or deadline reminders.

Recommendation 4. Prioritize development of practical resources, including quick-reference sheets (project category lists with typical incentive ranges), savings calculators for common measures, and truncated program information to help participants complete projects and communicate the value of incentives "at-a-glance." Design these tools for maximum shareability beyond the primary contact. The program could integrate these tools into existing communication channels rather than creating separate delivery mechanisms that require participants to seek them out. This could include adding tool links in email newsletters, prominently featuring them on the website, and ensuring energy advisors can share them during facility interactions.

Outcome 5. Email newsletters are highly effective for delivering clear information, but participants currently find them the least interesting or engaging. Participants rated communications positively across all measured dimensions, and email newsletters received generally high marks overall. However, newsletters scored the lowest among all channels for interesting and engaging content and also received the lowest rating for helping participants learn something new. Qualitative feedback reinforced this pattern, with some participants expressing interest in more innovative content, such as new market technologies, project ideas, and detailed incentive updates—content not currently prominent in the newsletter.

Recommendation 5. Tailor newsletter content to align with the specific topics requested by participants, such as new market technologies and detailed program and incentive updates. Integrating practical tools, such as at-a-glance project lists and ROI calculators, directly into the newsletter can transform it from an

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information source into an active decision-making aid for participants. Additionally, featuring innovative case studies highlighting successful projects at similar facilities can provide participants with new ideas they might struggle to generate internally.

12.2. Trade Ally Interviews

The evaluation team conducted trade ally interviews in fall 2025 to assess nonresidential trade allies' experiences with Focus on Energy communications. This research builds on prior nonresidential process evaluation efforts by examining how trade allies interact with the program and how they receive and perceive program communications. Additionally, interviews explored opportunities to strengthen engagement and drive uptake of prescriptive rebates.

The research focused on four key areas of communication: channels, frequency, content, and effectiveness. In addition to these key areas, the research also probed into factors influencing participation trends and organizational decision-making processes related to program engagement. The following sections describe the methodology and findings in detail.

12.2.1. Methodology

The evaluation team conducted 25 interviews with participating trade allies in the Business and Industry, Large Industrial, Schools and Government, and Agribusiness programs. The team drew from a sample frame of 285 trade allies and sampled by measure category and engagement levels. The team conducted all interviews over the phone, each lasting approximately 30 minutes. Participants received a \$100 gift card for their participation.

Table 116 shows that the team interviewed trade allies across five measure categories, with lighting comprising the majority of the sample (n=15). The final sample included representation from mechanical (n=3), agriculture (n=2), other measures such as renewables (n=4), and multi-measure trade allies (n=1). This distribution reflects both the research task target and the general distribution of trade ally types across Focus on Energy's nonresidential programs.

Table 116. Interviews by Measure Categories

Measure Category	Target	Complete
Lighting	14	15
Mechanical	6	3
Agriculture	2	2
Other Measures	4	4
Multiple Measures	2	1
Total	25-30	25

Table 117 lists the research objectives aligned with areas of investigation for the interviews.

Table 117. Research Topics

Research Topic	Area of Investigation
Program Changes and Participation Trends	Drivers of participation increase or decrease Reported changes to programs this year
Communication Effectiveness and Preferences	Preferred channels and frequency Timing of communications Energy advisor interaction frequency and value Awareness and usefulness of communications by channel Website use
Program Experience and Feedback	What is working well Biggest challenges and frustrations Overall satisfaction and areas for improvement

12.2.2. Participation Trends

The interviewed trade allies represented a range of participation in Focus on Energy nonresidential programs, from those with no recent involvement to those whose participation increased between CY 2024 and CY 2025. As Table 118 shows, 28% of interviewed trade allies experienced an increase in rebate activity in CY 2025 compared to CY 2024, and 16% saw a decrease in activity. Almost one quarter of the sample (24%) participated in only one of the two years.

Table 118. Trade Allies by Participation Trend (2024 – 2025)

Interviewed Trade Allies (n=25)	Population	Sample Frame	Completes
No 2024 Activity (Participation in 2025 only)	45%	27%	20% (n=5)
No 2025 Activity (Participation in 2024 only)	4%	5%	4% (n=1)
Low Activity ^a	19%	22%	24% (n=6)
2025 Decrease	15%	24%	16% (n=4)
Steady Activity	2%	7%	8% (n=2)
2025 Increase	16%	26%	28% (n=7)

^a Trade allies with low activity had less than one project per month, so a trend could not be determined.

Drivers of Increased Activity

Seven trade allies in the sample (n=25) experienced an uptick in projects in CY 2025 (four in lighting, two in agriculture, and one in multi-measure/mechanical). These trade allies attributed their increased activity to internal capacity and willingness to submit rebate applications, shifts in customer interest and ability, and increased incentives. Regarding internal capacity, one trade ally explained how increased staffing led to increased program activity, sharing that, “I think we’ve just done a better job of submitting [program applications] ... We got some extra help in the office this year.” A lighting trade ally highlighted their increased willingness, stating: “My willingness to do the rebates and ask the questions... I’ve spent more time focusing on it.” Several trade allies described shifts in customer interest and the ability to qualify for incentives. One agriculture trade ally stated how work is variable: “Some years we have more projects that qualify for Focus.” A lighting trade ally described similar variance in customer patterns: “Sometimes you’ll have a situation where you have a customer where they throw you stuff, then the next year they don’t

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throw you any stuff.” Multiple trade allies also noted the impact of increased incentives. An agriculture trade ally explained that “The incentives went up this year,” while a mechanical trade ally observed that, “once leak repair [incentive] changed... we haven’t done a ton yet, but we’ve already done two or three and are doing more....”

Drivers of Decreased Activity

Five trade allies (n=25) experienced a decrease or no activity in CY 2025 (four lighting, one mechanical). These trade allies identified decreased consumer spending and administrative burden as the primary factors; the combination of economic uncertainty and paperwork requirements created barriers to participation. One lighting trade ally described market conditions leading to less desire to spend on upgrades: “A little bit of slowdown and uncertainty in the market this year.... A lot of people were sitting on money.” Another lighting trade ally described the administrative challenge of taking on rebates, sharing that it was “a lot of different back and forth to put the time into it, almost have to have the whole thing figured out.” Additionally, some trade allies cited personal circumstances affecting their capacity, including aging as a contractor and time devoted to other business ventures, such as rental properties. For trade allies with low activity levels, proximity to other state utility programs also played a role, as three trade allies described being close to states like Illinois, where they could pursue projects under different utility programs with greater incentive levels.

12.2.3. Communication Preferences

Preferred Communication Channels

Interviewed trade allies overwhelmingly identified email as the “most useful” communication channel (23 of 25), with only two trade allies noting alternative preferences. Trade allies described email as essential for disseminating program updates, tracking program information over time, and coordinating rebates with internal staff members. One agriculture trade ally explained that for them, “most of our dealings are not urgent matters usually, so email is easy that way and doesn’t have to be taken care of right away.”

Importantly, all interviewees confirmed they were the appropriate program contact for email outreach. When asked whether any communication channels were overused or less effective, respondents did not identify any channel.

Satisfaction with Communication Frequency

When asked whether the amount of communication from Focus on Energy was just right, too much, or too little, 22 of 23 trade allies responded, “just right”, and one responded, “too much.” The sole trade ally who felt communications were too frequent did not express strong concerns and acknowledged that the information remained useful.

Regarding timing and seasonality, respondents provided specific guidance on when communications would be most valuable. Trade allies generally requested communication at the beginning or end of the calendar year, preferably “as early as possible” because information on forthcoming incentives supports their annual business planning. One trade ally emphasized program communications on remaining incentives: “The deadlines are probably the most important, because toward the end of the year, Focus

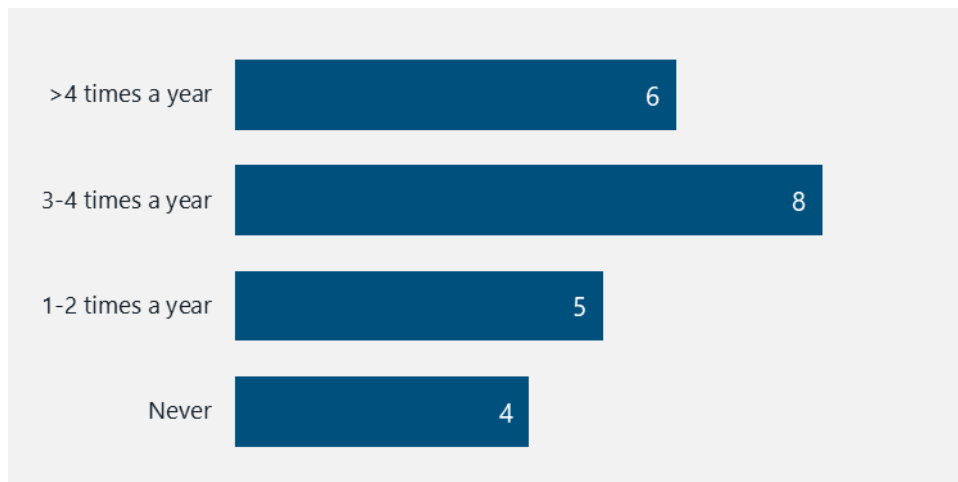
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runs out of money.” While some trade allies spoke of having greater project volume at certain times of the year, according to their trade, they did not request additional outreach from Focus on Energy during those busy periods.

Energy Advisor Outreach

The frequency of energy advisor outreach varied among interviewed trade allies, as shown in Figure 111. While over half of the trade allies (14 of 23) reported hearing from an energy advisor at least three times per year, four never heard from one.

Figure 111. Energy Advisor Outreach Frequency



Source: Nonresidential Trade Ally Interview Question: “How often do you hear from a Focus on Energy Advisor?” (n=23)

Interviewed trade allies reported satisfaction with current levels of energy advisor outreach, even among those who reported having little to no direct contact with energy advisors. Trade allies who received regular energy advisor outreach said they highly value the relationship, while those without this level of contact generally did not feel that limited energy advisor outreach is a gap in their program experience.

The four respondents who never heard from an energy advisor were asked directly whether energy advisor outreach would be helpful. Three did not express a strong desire for regular contact and said they would want energy advisor involvement only under specific conditions, such as technical issues with the portal, significant program changes, or new offering announcements. As one mechanical trade ally shared, “I don’t see any harm in having regular touchpoints, especially if there’s something new that goes into the program.”

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Among respondents who do receive energy advisor outreach, the value of these interactions was clear and highlighted. As summarized in Table 119, personalized outreach was the most frequently cited useful aspect of energy advisor interactions, with five respondents mentioning it. This was followed by deadline reminders, technical assistance, and program updates. One lighting trade ally described their energy advisor’s responsiveness and proactive engagement: “He is very helpful. Every time I reach out, he gives feedback and direction for me. He touches base every once in a while to see how things are going.”

“It is a good relationship, and we have to work together, because if I don’t know what’s going on, I have to explain it to my customers.”
-Mechanical Trade Ally

When asked if there was any way to improve energy advisor outreach, two trade allies cited the need for faster feedback on rebate amounts for custom or larger projects.

Table 119. Useful Aspects of Energy Advisor Interactions (n=25)

Useful Aspects of Energy Advisor Interactions	Count
Personalized outreach	5
Deadline reminders	4
Technical assistance	3
Program updates (e.g., on applications)	2

12.2.4. Program Materials and Resources

Co-Branding Materials

Many interviewed trade allies reported limited awareness or utilization of co-branded materials, such as logos, window signs, and promotional materials. Of the 23 trade allies that responded to the question, 10 were unaware of co-branding opportunities, six could not use them due to restrictions such as national account requirements, five were actively using co-branded materials, and two chose not to use them. The six trade allies who operated as national companies described how they used Focus on Energy incentives for Wisconsin customers but were limited in promoting regional programs.

Among the five trade allies who do use co-branded materials, applications varied. For example, one business incorporated the trade ally logo into email signatures, another displayed a Focus on Energy window sign at the office, and some reported past co-branding efforts with Focus for specific promotions. One renewables trade ally noted how they “have the trade ally logo on the back of my work truck.”

Factsheets, Videos, and Toolkits

Similar to the co-branded materials, factsheets, videos, and toolkits designed to educate about energy efficiency concepts, equipment, and the Focus on Energy programs, remained largely unknown or unused among the interviewed trade allies. Of the 21 respondents who answered this question, 13 were unaware of these educational materials, four were aware but not using them, and four were actively using them or had used them.

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When the team described these materials to trade allies who were unaware of them, some respondents expressed interest and identified potential use cases, specifically noting educational materials that help explain energy-saving concepts to customers. One lighting trade ally explained that if they had the materials, “I’ll use it to sell. And it would be nice to have a better understanding of energy savings. Some people have asked that. I haven’t had a good response to that.”

Newsletters

Over half of the trade allies (14 of 25) recalled receiving and reviewing the newsletter. Most described spending little time reviewing it. One lighting trade ally described their approach as “more of a brief skim over than anything,” while another said: “I blast through it...I don’t get them too much, but here and there.” In their quick review, trade allies said they check for reminders of incentives, anything new or changed, and program updates relevant to their specific trade. Despite the quick review, trade allies said they considered the newsletter as a source for staying informed about program changes that could impact their business.

Website

Most trade allies (22 of 25) said they visit the Focus on Energy website infrequently, and when they do, it is primarily to access resources. Twenty-two trade allies reported visiting the site anywhere from a few times a year to on a monthly basis to download updated workbooks, catalogs, and qualified product lists, check on incentives, and identify energy advisors for certain regions. One agriculture trade ally stated how they “mostly use the booklet we have,” and a lighting trade ally similarly noted, “I generally don’t go to the website. I go straight to the catalog. If I can’t find what I’m looking for, I go to my energy advisor.”

Year-Over-Year Reports

Nine respondents (n=25) had received the year-over-year (YoY) report for high-engagement trade allies, and all recipients who did find it useful. The report provided trade allies with program-wide context to help them understand their company’s activity levels. Two used it in their own company’s marketing, and one used it to reflect on program activity. One trade ally stated: “We always share that [YoY report] on social media.” A lighting trade ally reported: “I posted it on our website...I used it as a marketing thing.” Another lighting trade ally appreciated seeing comparative data, explaining, “I can see what the rest of the team is doing.”

When asked about rewards for meeting participation goals, eight of the nine trade allies who received the YoY report expressed interest. However, two trade allies noted some potential conflict between individual-level incentives versus company-level rewards for year-over-year bonuses.

Additionally, one agribusiness trade ally reported receiving the agribusiness-specific *Year-End Review* flier previously, though not in the most recent year. They said it was useful for showing energy savings data and passed it around to other managers at the company.

Case Studies

Twelve trade allies (n=25) reported having seen and reviewed case studies in Focus on Energy materials previously. Three reported actively using them in sales, and four said they use them to keep up with

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industry trends. When asked who the primary audience is for case studies, four found that case studies benefited their business, while six found them primarily for customers and end users. One lighting trade ally explained their sales application: "I love those case studies...I've made recommendations based on these case studies that I wouldn't have known about." A mechanical trade ally noted case studies' role in building trust in projects, "Most useful to use as a tool to help sell...It helps add credibility." The four who said they review them to keep up with industry trends explained it as a way to educate themselves.

Lunch and Learns

Six trade allies (n=25) reported attending lunch-and-learn training sessions offered by Focus on Energy. These respondents provided positive feedback, noting that the sessions stayed on task, programming was well put together, remote options were appreciated, and the content was informative.

12.2.5. General Program Feedback

Incentive Increases

Trade allies were asked to describe any recent program changes they noticed. The most common trend they noted was an increase in incentives for agricultural waterers, exterior lighting, and lighting fixtures, and leak repair. Seven trade allies highlighted these increases positively, noting that higher incentives make it easier to close sales and encourage customer buy-in to efficient projects. One lighting trade ally stated, "The rebates themselves for the customer went up, which always helps with selling some of these lighting projects to people. If you can dangle that carrot in front of them."

However, respondents mentioned retro-commissioning and solar had stagnant or declining incentives, which created challenges for trade allies working in these measure categories. One trade ally noted concerns about retro-commissioning: "Well, the biggest thing was the retro-commissioning offering. It's no longer a minimum of 10 cents a square foot." Another renewables trade ally said, "\$30K solar project, \$300 is not going to shift, not going to move the needle. When we get busy and don't do the Focus apps, I just give the customer a \$300 credit on their bill."

Lighting Application

Lighting trade allies reported noticeable improvements from recent application simplifications. Four respondents noted that lighting forms appeared simpler and appreciated that certain measures had moved from custom to prescriptive pathways. They explained that this reduced the documentation burden and allowed them to process more projects and respond more quickly to customer inquiries. These changes received enthusiastic feedback from trade allies. One trade ally explained the structural improvements: "They simplified the lighting measures, they bundled them together so there weren't so many categories, which made a lot of sense." Another lighting trade ally detailed the business benefits: "It's made the workflow easier, made it easier for me to bid jobs and move on to the next, and get an incentive summarized on an ROI easily, versus the long, drawn-out method it used to take." A third trade ally noted reduced technical

"It's made the workflow easier, made it easier for me to bid jobs and move on to the next, and get an incentive summarized on an ROI easily, versus the long, drawn-out method it used to take."

-Lighting Trade Ally

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complexity: "I thought it was less complicated. Before, I was counting a lot of watts and things everywhere. I notice less of that."

A few trade allies reported concerns in other measure categories, specifically regarding retro-commissioning documentation requirements relative to incentive value (suggesting the paperwork burden may not justify the rebate amount) and the accuracy of HVAC/mechanical website information compared to the Qualified Products List. For example, one mechanical trade ally said they found website descriptions of incentive-eligible commercial boiler and water-heating equipment that differed from the equipment specified in the list.

Focus on Energy as a Business Partner

Beyond traditional program administration, Focus on Energy has begun taking on a more active business partnership role with some trade allies through project referrals for pilot offerings and application support services. Two lighting trade allies reported receiving project leads from Focus on Energy, which they viewed very positively. Aside from lighting, two trade allies had an interest in receiving program leads. One mechanical trade ally specializing in steam trap work noted their interest in receiving referrals: "I would like to get those calls if they exist. I would like to expand to Wisconsin. I can fit them into other surveys pretty easily."

Additionally, Focus on Energy has introduced an application support service where trade allies can submit project information online, and program staff will enter the information into an application on their behalf. One lighting trade ally highlighted the value of this service: "Focus has started doing something where you send them what you have, and they fill out the applications for you...huge."

12.2.6. Comparison to Participant Survey Findings

The trade ally interview findings can be contextualized through comparison with Focus on Energy's CY 2025 participant survey results, which captured perspectives from Business and Industry and Large Industrial end-use customers. The trade ally interview findings align with the participant survey in several key areas.

Both trade allies and participants reported general satisfaction with the current Focus on Energy communication frequency. Ten percent of participants who recalled communication requested more frequent contact. Both trade allies and participants reported that email and energy advisors were the most effective touchpoints, and they highly valued interactions with energy advisors for their personalized, responsive nature.

The most notable difference between the two groups concerns proactive engagement with energy advisors. Participants, especially Business and Industry customers without prior contact with an energy advisor, reported interest in more proactive energy advisor outreach (25% of Business and Industry respondents). In contrast, trade allies reported they were largely satisfied with current energy advisor contact levels, and those without energy advisor contact generally did not desire additional contact.

12.3. Outcomes and Recommendations

This section outlines key outcomes from trade ally engagement with Focus on Energy communications and energy advisor interactions, along with recommendations for Focus's communication strategy.

Outcome 1. The current trade ally communication strategy is largely effective. Trade allies reported satisfaction with the amount and channel of communication from Focus on Energy, identifying email as the preferred channel and no channels as overused. Though only some trade allies received the year-over-year reports, recipients reported engaging with them and sharing them with colleagues, in some cases using them as a marketing tool.

Recommendation 1. Consider expanding the year-over-year reports to more participants to help them understand their level of program engagement. Providing these reports to more trade allies may help them benchmark their activity and demonstrate their ability to deliver savings to customers.

Outcome 2. The website and newsletters are secondary information resources for trade allies, who rely on program documents, such as the catalog and energy advisor outreach.

Recommendation 2. For the Focus on Energy website, prioritize ease of navigation for key functions (e.g., accuracy of product requirements and program eligibility, workbook downloads, catalog access, energy advisor directory). Any efforts to expand content or features for trade allies should ensure these core functions are easy to find and access.

Outcome 3. Awareness and use of program materials (e.g., co-branding, factsheets, videos, and toolkits) are low, despite some interest. Many trade allies said they were unaware of or not actively using co-branded materials and educational resources. When described, some respondents said these materials could be useful.

Recommendation 3. Increase awareness and uptake of program materials by consulting with trade allies when developing materials to understand how they would use them in their specific business contexts. Promote materials with clear use cases tailored to different trade ally business models, prioritizing simple customer-facing tools that help trade allies communicate energy savings; note that promotional materials (logos, co-branding) may be more valuable to some trade ally types than others, such as in-state trade allies versus national trade allies.

Outcome 4. Improvements to the program application have helped lighting trade allies. Lighting trade allies reported that simplified applications and measures reduced administrative burden, improved workflows, and made it easier to follow through with incentives.

Recommendation 4. Continue application reviews outside of lighting by exploring opportunities to shift additional measures from custom to prescriptive and reviewing and clarifying documentation requirements. Explore if the administrative burden of existing applications, combined with certain incentive levels, may be causing trade allies to install qualifying measures outside of the program.

13. CROSS-CUTTING PROGRAMS

This section presents the CY 2025 evaluation results for these cross-cutting programs and their offerings, by chapter.

Instant Discount Program

- Commercial Sector
- Residential Sector

Renewable Rewards Program

- Residential and Business

Pilots

- Accessible Efficiency Pilot
- Community Impact Pilot
- Life Sciences Midstream Pilot

14. Instant Discount Program

The Instant Discount Program offers discounted equipment to residential and commercial customers who purchase qualifying residential-sized HVAC, commercial food service, or water heating equipment from a participating distributor. The program provides incentives to participate in distributors for selling qualified equipment; the distributor then passes the incentive to the end-user, eliminating the need for a customer to submit a traditional rebate application. Distributors may receive a sales performance incentive fund (“spiff”) for participating in the discount process. Higher incentives and discounts are available to eligible limited-income customers who install HVAC equipment.

Focus on Energy launched this program in April 2024 to replace the previous Midstream Program. In July 2024, it also transitioned incentives for residential-sized HVAC equipment from the Trade Ally Solutions Program and business programs to the Instant Discount Program. Thus, 2025 was the first full year of operation for the program.

In CY 2025, APTIM administered the Instant Discount Program, and Energy Solutions was the prime implementer. Franklin Energy was the SPECTRUM incentive processing lead, and CLEAResult and Franklin Energy provided field outreach support.

Table 120 summarizes the impacts of the Instant Discount Program in CY 2025.

Table 120. CY 2025 Instant Discount Summary

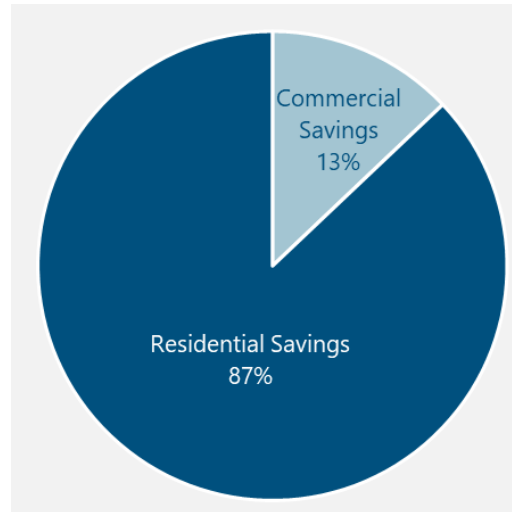
Item	Units	CY 2025
Incentive Spending ^a	\$	\$6,507,941
Participation	Number of Participants	29,018
Verified Gross Lifecycle Savings	kWh	-70,859,437 ^a
	kW summer	1,868
	kW winter	-2,013
	therms	71,079,438 ^a
Verified Gross Lifecycle Realization Rate	% (MMBtu)	102%
Annual NTG Ratio	% (MMBtu)	61%
Net Annual Savings	kWh	-1,160,629
	kW summer	1,106
	kW winter	-1,139
	therms	2,289,510
Net Lifecycle Savings	MMBtu	4,183,929
Cost-Effectiveness ^b	TRC Test: Benefit/Cost Ratio	1.27

^a The program had a negative kWh impact and high therms impact in CY 2025 because of air-source heat pumps that replace gas heating systems. These systems add significant electric heating load to a home and achieve significant therm savings because they reduce the gas heating load.

Direct comparison of the CY 2024 and CY 2025 Instant Discount Programs is not recommended due to the transitional nature of the program in CY 2024.

Figure 112 shows the percentage of Instant Discount Program lifecycle MMBtu savings by residential and commercial sectors.

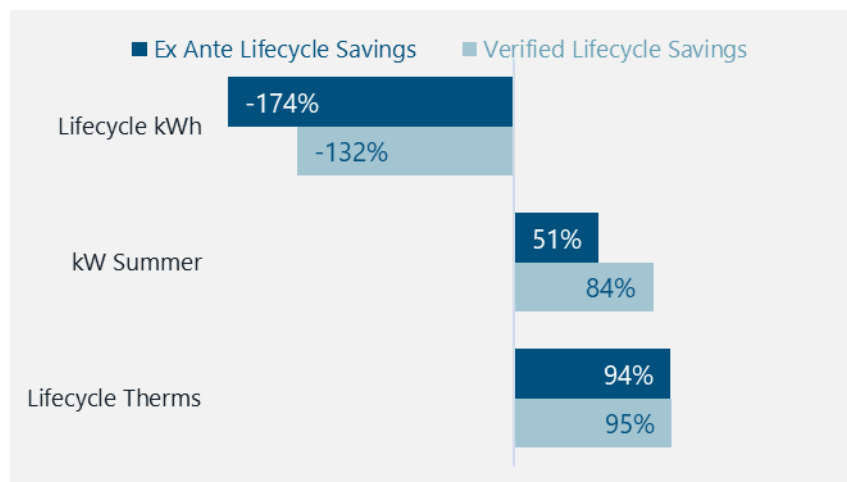
Figure 112. Instant Discount Gross Lifecycle Savings by Sector



14.1. Achievement Against Goals

Figure 113 shows the percentage of gross lifecycle savings goals achieved by the Instant Discount Program in CY 2025. Overall, the program fell short of its kWh, kW, and therm goals. The program's overall kWh and kW impacts were negative because of the substantial negative kWh and kW impacts attributed to increased participation from customers installing air-source heat pumps that replace gas heating systems.

Figure 113. CY 2025 Instant Discount Program Achievement of Gross Lifecycle Savings Goals



14.2. Impact Evaluation

This section contains the findings for the CY 2025 impact evaluation at the program level, followed by a discussion of each sector.

14.2.1. Impact Evaluation Methodology

The evaluation team conducted an impact assessment of the CY 2025 Instant Discount Program using a combination of primary and secondary data sources.

Table 121 lists specific data collection activities and the number of completed activities in the CY 2025 impact evaluation. Additional details about these activities can be found in the offering-specific discussions below and in Appendix H. Net Savings analysis in Volume III.

Table 121. CY 2025 Instant Discount Program Impact Evaluation Activities and Sample Sizes

Activity	Sector	Number of Completes
Tracking Database Review	All	Census
Distributor Interviews	HVAC	10
Contractor Interviews	HVAC	10

14.2.2. Verified Gross Savings Results for Instant Discount Program

Table 122 lists the first-year and lifecycle realization rates for CY 2025 by sector within the commercial and residential sectors, and Table 123 lists the verified first-year and lifecycle savings by sector. Overall, the Instant Discount Program achieved a first-year evaluated realization rate of 103%, weighted by total (MMBtu) energy savings. The next section discusses detailed findings for each sector, including factors affecting the realization rates.

Table 122. CY 2025 Instant Discount Program First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Commercial Food Service	109%	108%	102%	104%	105%	108%	104%	104%
Commercial HVAC	98%	100%	113%	99%	99%	98%	99%	99%
Commercial Water Heating	100%	100%	100%	100%	100%	100%	100%	100%
Commercial Total	108%	106%	102%	103%	103%	108%	102%	103%
Residential HVAC, Standard Income	81%	180%	97%	100%	102%	90%	100%	101%
Residential HVAC, Income Qualified	104%	161%	101%	100%	100%	104%	100%	100%
Residential Water Heating	179%	178%	103%	155%	163%	203%	149%	165%
Residential Total	71%	179%	96%	101%	103%	82%	101%	102%
Total Instant Discount Program	53%^a	165%	96%	101%	103%	76%^a	101%	102%

^a The overall first-year and lifecycle kWh realization rates are notably lower than the sector-level first-year and lifecycle kWh realization rates. The difference is driven by significant negative kWh savings in the Residential sector, which offset positive kWh savings in the Commercial sector. Overall MMBtu, kWh, and kW realization rates for each sector present a more accurate summary of the program's achievement.

Table 123. CY 2025 Instant Discount Program First-Year and Lifecycle Verified Gross Energy Savings

Offering	Verified Gross First-Year Savings					Verified Gross Lifecycle Savings		
	kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
Commercial Food Service	2,360,625	194	205	407,683	48,823	24,176,656	4,812,391	563,730
Commercial HVAC	37,771	32	3	119,996	12,128	665,266	2,581,474	260,417
Commercial Water Heating	21,210	14	14	37,390	3,811	254,520	602,598	61,128
Commercial Savings	2,419,606	240	222	565,069	64,763	25,096,442	7,996,462	885,275
Residential HVAC, Standard Income	-6,002,967	1,390	-2,494	3,035,279	283,046	-110,496,764	60,648,772	5,687,862
Residential HVAC, Income Qualified	-147,206	41	-61	71,829	6,681	-2,484,673	1,380,788	129,601
Residential Water Heating	1,238,557	198	320	76,961	11,922	17,025,558	1,053,415	163,433
Residential Savings	-4,911,616	1,628	-2,235	3,184,069	301,649	-95,955,879	63,082,975	5,980,896
Total Instant Discount Program	-2,492,010	1,868	-2,013	3,749,138	366,411	-70,859,437	71,079,438	6,866,171

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Commercial Sector: Verified Gross Savings Results

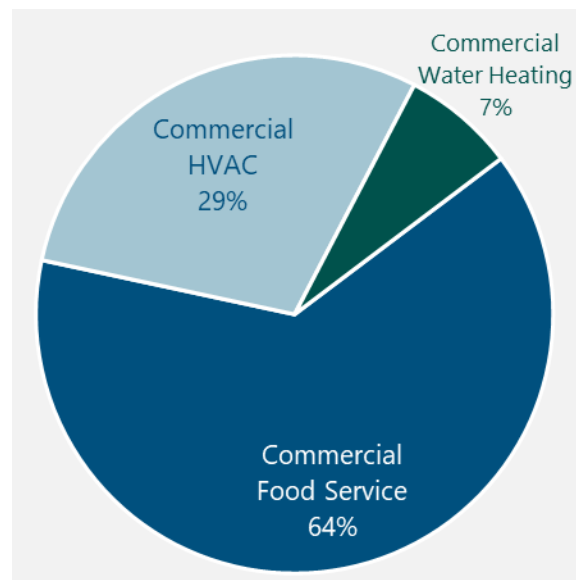
Table 124 lists the CY 2025 *ex ante* and verified gross first-year and lifecycle savings for the commercial sector. For CY 2025, the commercial sector had a gross lifecycle realization rate of 103% (MMBtu).

Table 124. CY 2025 Commercial Sector *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	2,234,956	226	218	550,938	2,419,606	240	222	565,069
Lifecycle Gross Savings	23,267,660	226	218	7,838,297	25,096,442	240	222	7,996,462

Figure 114 shows the breakdown of total verified gross lifecycle energy savings in the commercial sector by equipment type. Most savings are from commercial food service measures, followed by HVAC measures.

Figure 114. Commercial Sector Gross Lifecycle MMBtu Savings by Equipment Type



The evaluation team relied on the 2025 TRM to calculate savings for most commercial measures. For measures not in the 2025 TRM, the evaluation team relied on several work papers approved outside the 2025 TRM process to assess savings from the commercial sector in CY 2025. The team found various differences between *ex ante* and verified gross savings at the measure level. Table 125 and Table 126 describe evaluation findings for the food service and HVAC sectors when measure-level realization rates were not 100%. For all measures in both groups, verified savings relied on the 2025 TRM. Differences between the TRM-based verified savings and *ex ante* savings resulted in realization rates above or below 100%.

Table 125. CY 2025 Commercial Sector Savings Analysis Findings – Food Service

MMID/ Measure Type	Gross Savings Finding	MMID Realization Rate
2293/Dishwasher	<i>Ex ante</i> savings for one entry used an annual therm value much lower than the value in the 2025 TRM.	RR _{therm-annual} : 172.9%
2530/Refrigerator	<i>Ex ante</i> savings for three of the six entries (all new construction) used annual kW-summer and kW-winter values slightly higher than the values in the 2025 TRM.	RR _{kW-Summer} : 87.5% RR _{kW-Winter} : 87.5%
2677/Hot Food Holding Cabinet	<i>Ex ante</i> savings for one entry used annual kW-summer and kW-winter values much higher than the values in the 2025 TRM.	RR _{kW-Summer} : 82.7% RR _{kW-Winter} : 133%
3137/Dishwasher	<i>Ex ante</i> savings for one new construction entry were listed with zero associated savings.	RR _{kWh-annual} : 105.3% RR _{kW-Summer} : 105.3% RR _{therm-annual} : 105.3%
3906/Ice Machine	<i>Ex ante</i> savings for two entries were listed with zero associated savings.	RR _{kWh-annual} : 124.1% RR _{kW-Summer} : 124.1% RR _{kW-Winter} : 112.6%
4711/Steamer	<i>Ex ante</i> savings for one of three entries used an annual kWh value much higher than the value in the 2025 TRM.	RR _{kWh-annual} : 28.7%
10103/Ventilation Controls	<i>Ex ante</i> savings for four entries were listed with zero associated savings.	RR _{kWh-annual} : 142.6% RR _{kW-Summer} : 139.1% RR _{kW-Winter} : 123.0% RR _{therm-annual} : 150.9%

Table 126. CY 2025 Commercial Sector Savings Analysis Findings - HVAC

MMID/ Measure Type	Gross Savings Finding	MMID Realization Rate
3491/Furnace	<i>Ex ante</i> savings for two entries used annual kWh, kW-winter, and therm values that were higher than the values in the 2025 TRM.	RR _{kWh-annual} : 93.1% RR _{kW-Winter} : 93.6% RR _{therm-annual} : 93.1%
10293/Boiler	<i>Ex ante</i> savings for some entries used an annual therm value much lower than the value in the 2025 TRM.	RR _{therm-annual} : 182.0%
10294/Boiler	<i>Ex ante</i> savings for some entries used an annual therm value much higher than the value in the 2025 TRM.	RR _{therm-annual} : 87.4%

Residential Sector: Verified Gross Savings Results

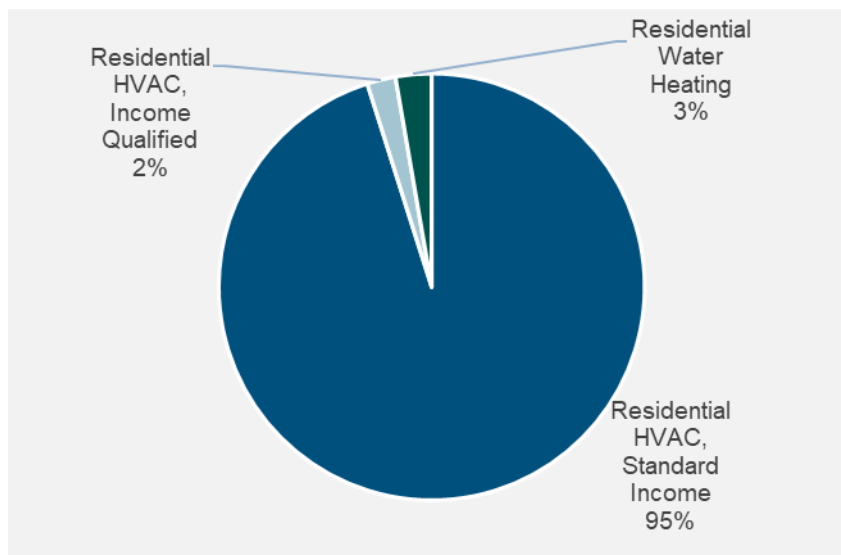
Table 127 lists the CY 2025 *ex ante* and verified gross first-year and lifecycle savings for the residential sector. For CY 2025, the sector had a gross lifecycle MMBtu realization rate of 102%.

Table 127. CY 2025 Residential Sector *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	-6,895,519	908	-2,321	3,156,026	-4,911,616	1,628	-2,235	3,184,069
Lifecycle Gross Savings	-116,764,038	908	-2,321	62,625,556	-95,955,879	1,628	-2,235	63,082,975

Figure 115 shows the breakdown of total verified gross lifecycle energy savings in the residential sector by equipment type. Most savings are from residential HVAC measures, followed by residential water heating.

Figure 115. Residential Sector Gross Lifecycle MMBtu Savings by Equipment Type



The evaluation team relied on the 2025 TRM for most measures. For measures not included in the 2025 TRM, the evaluation team relied on several work papers approved outside of the 2025 TRM process to assess savings from the residential sector in CY 2025. As described in the following tables, the team found various differences between *ex ante* and verified gross savings at the measure level.

Table 128 describes evaluation findings for residential water heating measures when measure-level realization rates were not 100%. For all measures in this category, the evaluation team used the 2025 TRM to calculate savings. Differences between the TRM-based verified savings and *ex ante* savings resulted in realization rates above or below 100%.

Table 128. CY 2025 Residential Sector Savings Analysis Findings – Water Heating

MMID/ Measure Type	Gross Savings Finding	MMID Realization Rate
5008/Heat Pump Water Heater	<i>Ex ante</i> savings for the majority of entries were listed with zero associated savings.	RR _{kWh-annual} : 423.5% RR _{kW-Summer} : 439.0% RR _{kW-Winter} : 106.6% RR _{therm-annual} : 423.5%
5586/Natural Gas Instant Water Heater	<i>Ex ante</i> savings for two entries were listed with zero associated savings.	RR _{therm-annual} : 121.1%
10009/Water Heater	<i>Ex ante</i> savings for one entry were listed with zero associated savings.	RR _{kWh-annual} : 166.7% RR _{kW-Summer} : 166.7%

MMID/ Measure Type	Gross Savings Finding	MMID Realization Rate
10410/Heat Pump Water Heater	<i>Ex ante</i> kWh savings for one entry were listed with zero associated savings; <i>Ex ante</i> kW savings were lower than 2025 TRM.	RR _{kWh-annual} : 120% RR _{kW-Summer} : 98.0% RR _{kW-Winter} : 91.8% RR _{therm-annual} : 120%
10411/Heat Pump Water Heater	<i>Ex ante</i> savings for one-third of entries were listed with zero associated savings.	RR _{kWh-annual} : 147.4% RR _{kW-Summer} : 145.5% RR _{kW-Winter} : 100.7% RR _{therm-annual} : 113.4%

Table 129 through Table 131 describe evaluation findings for residential HVAC, standard income measures when measure-level realization rates were not 100%. For all measures in this category, the evaluation team used the 2025 TRM to calculate savings. Differences between the TRM-based verified savings and *ex ante* savings resulted in realization rates above or below 100%.

Table 129. CY 2025 Residential Sector Savings Analysis Findings – Air-Source Heat Pump, Standard Income

MMID	Gross Savings Finding	MMID Realization Rate
10198	<i>Ex ante</i> savings applied unvetted savings from outside of the TRM. Verified savings applied savings for the equivalent code baseline measure from the 2025 TRM.	RR _{kWh-annual} : 97.1% RR _{kW-Summer} : 92.9%
10199	<i>Ex ante</i> savings applied unvetted savings from outside of the TRM. Verified savings applied savings for the equivalent code baseline measure from the 2025 TRM.	RR _{kWh-annual} : 86.5% RR _{kW-Summer} : 76.0%
10255	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 160.1%
10257	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 183.5%
10259	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 165.3% RR _{kW-Winter} : 137.3%
10261	<i>Ex ante</i> savings for all entries used annual kWh, kW-summer, and kW-winter values lower than the values in the 2025 TRM.	RR _{kWh} : 100.9% RR _{kW-Summer} : 145.3% RR _{kW-Winter} : 101.5%
10263	<i>Ex ante</i> savings for all entries used annual kWh, kW-summer, and kW-winter values that were much higher or lower than the values in the 2025 TRM.	RR _{kWh} : 100.8% RR _{kW-Summer} : 150.3% RR _{kW-Winter} : 101.8%
10265	<i>Ex ante</i> savings for all entries used annual kWh, kW-summer, and kW-winter values much lower than the values in the 2025 TRM.	RR _{kWh} : 101.5% RR _{kW-Summer} : 111.05% RR _{kW-Winter} : 90.84%
10267	<i>Ex ante</i> savings for all entries used annual kWh, kW-summer, and kW-winter values much lower than the values in the 2025 TRM.	RR _{kWh-annual} : 103.4% RR _{kW-Summer} : 171.8% RR _{kW-Winter} : 105.8%
10269	<i>Ex ante</i> savings for all entries used an annual kWh value much higher than the value in the 2025 TRM, while all entries also used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kWh-annual} : 69.6% RR _{kW-Summer} : 177.9%
10271	<i>Ex ante</i> savings for all entries used an annual kWh value much higher than the value in the 2025 TRM, while all entries also used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kWh-annual} : 74.6% RR _{kW-Summer} : 198.9%

MMID	Gross Savings Finding	MMID Realization Rate
10273	<i>Ex ante</i> savings for all entries used an annual kWh value much higher than the value in the 2025 TRM, while all entries also used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kWh-annual} : 81.3% RR _{kW-Summer} : 128.1%

Table 130. CY 2025 Residential Sector Savings Analysis Findings – Mini Split Heat Pump, Standard Income

MMID	Gross Savings Finding	MMID Realization Rate
10200	<i>Ex ante</i> savings applied unvetted savings from outside of the TRM. Verified savings applied savings for the equivalent code baseline measure from the 2025 TRM.	RR _{kWh-annual} : 94.9% RR _{kW-Summer} : 60.3%
10201	<i>Ex ante</i> savings applied unvetted savings from outside of the TRM. Verified savings applied savings for the equivalent code baseline measure from the 2025 TRM. Additionally, five entries claimed zero <i>ex ante</i> savings.	RR _{kWh-annual} : 131% RR _{kW-Summer} : 66.0%
10245	<i>Ex ante</i> savings for two entries used annual kWh and kW-winter values much higher than the values in the 2025 TRM.	RR _{kWh-annual} : 61.6% RR _{kW-Winter} : 58.8%
10247	<i>Ex ante</i> savings for one entry used negative annual kWh and kW-summer values, which are much lower than those in the 2025 TRM.	RR _{kWh-annual} : 104.7% RR _{kW-Summer} : 123.7%
10291	<i>Ex ante</i> savings used annual kWh and kW summer savings mapped to MMID 10247/10248, which inflated savings.	RR _{kWh-annual} : 97.8% RR _{kW-Summer} : 53.3%

Table 131. CY 2025 Residential Sector Savings Analysis Findings – Other HVAC, Standard Income

MMID/ Measure Type	Gross Savings Finding	MMID Realization Rate
4964/Furnace	One-tenth of entries claimed zero <i>ex ante</i> savings.	RR _{kWh-annual} : 111.9% RR _{therm-annual} : 111.9%
10052/Smart Thermostat	<i>Ex ante</i> savings were calculated based on miscategorized MMIDs. Verified savings were calculated based on recategorized MMIDs and the 2025 TRM.	RR _{kWh-annual} : 1463.2% RR _{therm-annual} : 1463.2%
10053/Smart Thermostat	<i>Ex ante</i> savings were calculated based on miscategorized MMIDs. Verified savings were calculated based on recategorized MMIDs and the 2025 TRM.	RR _{kWh-annual} : 78.6%
10294/Boiler	<i>Ex ante</i> savings for some entries used an annual therm value much higher than the value in the 2025 TRM.	RR _{therm-annual} : 83.9%

Table 132 describes evaluation findings for residential HVAC, income-qualified measures, when measure-level realization rates were not 100%. For all measures in this category, the evaluation team used the 2025 TRM to calculate savings. Differences between the TRM-based verified savings and *ex ante* savings resulted in realization rates above or below 100%.

Table 132. CY 2025 Residential Sector Savings Analysis Findings – HVAC, Income Qualified

MMID/ Measure Type	Gross Savings Finding	MMID Realization Rate
10256/Air-source heat pump	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 209.8%
10258/Air-source heat pump	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 204.7%
10260/Air-source heat pump	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 176.5%
10262/Air-source heat pump	<i>Ex ante</i> savings for all entries used annual kW-summer and kW-winter values much lower than the values in the 2025 TRM.	RR _{kW-Summer} : 148.4% RR _{kW-Winter} : 101.2%
10264/Air-source heat pump	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 199.1%
10266/Air-source heat pump	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 204.7%
10268/Air-source heat pump	<i>Ex ante</i> savings for all entries used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kW-Summer} : 176.5%
10272/Air-source heat pump	<i>Ex ante</i> savings for all entries used an annual kWh value much higher than the value in the 2025 TRM, while all entries also used an annual kW-summer value much lower than the value in the 2025 TRM.	RR _{kWh-annual} : 74.6% RR _{kW-Summer} : 209.8%

14.2.3. Verified Net Savings Results for the Instant Discount Program

The evaluation team calculated an overall NTG estimate of 61% for the program in CY 2025. The total NTG is largely driven by residential standard-income HVAC measures, which account for the majority of verified gross savings and have a 59% NTG. Table 133 shows the weighted-average NTG ratio by sector as well as the total first-year gross and net savings.

Table 133. CY 2025 Instant Discount First-Year Net Savings and NTG

Sector/Measure Type	First-Year Gross Verified Savings (MMBtu)	First-Year Net Savings (MMBtu)	NTG Ratio
Commercial Food Service	48,823	36,129	74%
Commercial HVAC	12,128	6,808	56%
Commercial Water Heating	3,811	2,211	58%
Commercial Total	64,763	45,148	70%
Residential HVAC, Standard Income	283,046	166,248	59%
Residential HVAC, Income Qualified	6,681	6,681	100%
Residential Water Heating	11,922	6,915	58%
Residential Total	301,649	179,843	60%
Total Instant Discount Program	366,411	224,991	61%

Table 134 summarizes NTG sources by sector and measure type.

Table 134. CY 2025 Instant Discount NTG Sources

Measure Category	NTG Ratio	NTG Source
Commercial Food Service	74%	2025 Instant Discount Program distributor self-report NTG analysis
Water Heating	58%	Average NTG of other Instant Discount Program measures
Air-Source Heat Pump, Standard Income	58%	2025 Instant Discount Program distributor and contractor self-report NTG analysis
Boiler, Standard Income	60%	2025 Instant Discount Program distributor and contractor self-report NTG analysis
Ductless Mini-Split Heat Pump, Standard Income	64%	2025 Instant Discount Program distributor and contractor self-report NTG analysis
Furnace, Standard Income	53%	2025 Instant Discount Program distributor and contractor self-report NTG analysis
Income Qualified, All Measures	100%	Assume 100% NTG

Self-Report NTG

In CY 2025, the evaluation team administered distributor and contractor surveys to collect data that informed the NTG ratio estimate for measures distributed through the Instant Discount Program. The survey included questions aligned with a causal pathway NTG methodology; the team used these findings to estimate an NTG ratio.

The team calculated an NTG ratio of 61% for the Instant Discount Program. For a detailed description of NTG analysis methodology and findings, refer to Appendix G. Net Savings analysis in Volume III.

14.3. Process Evaluation

The CY 2025 process evaluation of the Instant Discount Program focused on collecting trade ally feedback to determine how perceptions and satisfaction with the program had evolved since Focus on Energy transitioned from the Midstream to the Instant Discount Program. In addition, the process evaluation explored end customers' experiences with heat pumps to understand their motivations, satisfaction, and general familiarity with them.

14.3.1. Process Evaluation Methodology

In CY 2025, the evaluation team designed its process evaluation of the Instant Discount Program to collect program feedback from HVAC distributors and contractors, as well as food service distributors.

Additionally, the evaluation team conducted a survey with Trade Ally Solutions Program participants who installed a heat pump in the second half of CY 2023 and the first half of CY 2024. Table 135 lists the data collection activities and sample sizes for all primary data collection.

Table 135. CY 2025 Instant Discount Program Process Evaluation Activities and Sample Sizes

Activity	CY 2025 Completes (n)
Program Documentation Review	1
HVAC Distributor Interviews	10
HVAC Contractor Interviews	10
Food Service Distributor Interviews	10
Heat Pump Customer Survey	436

Program Documentation Review

The evaluation team reviewed the Instant Discount Program CY 2025 implementation and marketing plans to understand the program’s structure and its implementation in CY 2025. The team also reviewed miscellaneous documentation throughout the year, including *ad hoc* updates from the program administrator, to understand program updates and progress in CY 2025.

Trade Ally Interviews

The evaluation team conducted in-depth interviews with 10 HVAC distributors, 10 HVAC contractors, and 10 food service distributors who participated in the program in CY 2025.

Energy Solutions provided contact information for all participating distributors, which included 17 food service distributors, 20 HVAC distributors, and 56 HVAC contractors. Energy Solutions sent an initial outreach email to these trade allies in September 2025, alerting everyone to an upcoming email from the evaluation team requesting an interview. The team sent trade allies three invitation emails, one per week, and followed up with a phone call as the final outreach attempt. Interviews took place in September and October 2025 and lasted between 45 and 70 minutes each. Table 136 shows the primary objectives of the trade ally interviews.

Table 136. HVAC and Food Service Distributor and HVAC Contractor Interview Research Objectives

Key Research Topics	Areas of Investigation
Company profile	What types of equipment do distributors and contractors sell, and to whom and where?
Distributors’ and contractors’ experiences, satisfaction, and desired changes; contractors’ awareness	How comfortable are distributor staff and contractors selling heat pumps and eligible high-efficiency equipment? How comfortable are contractors, from a distribution perspective, and their own perspective, switching to high-efficiency equipment, and from gas to electricity?
Program expectations and satisfaction	What were the distributors’ and contractors’ expectations about the program? What are their experiences so far?
NTG for stocking/upselling/pricing	What were the distributors’ and contractors’ stocking practices, and how has the Instant Discount Program influenced these practices?
Suggestions to support growth	What else could Focus on Energy do to help increase the sales of high-efficiency equipment? These questions were asked only of distributors.

Heat Pump Participant Surveys

The evaluation team fielded the online survey in September 2025 among customers who installed a heat pump through the Trade Ally Solutions Program in late CY 2023 and early CY 2024. Table 137 summarizes the survey's primary objectives.

Table 137. Heat Pump Participant Survey Research Objectives

Key Research Topics	Areas of Investigation
Awareness and Motivations	Why did the customer install new HVAC equipment? How much research on heat pumps did they do before deciding to purchase one?
Experience and Benefits	How easy or difficult was it to learn how to use the heat pump system? What benefits have customers experienced since installing the heat pump?
Equipment and Switchover Information	What type of equipment did the new heat pump replace? How familiar are dual-fuel heat pump customers with switchover temperatures?
Contractor Experience	What was the customer's satisfaction with the installation contractor?
Demographic Information	What is the home type? Who pays the utility bills? Is the heat pump the main source of heating?

The evaluation team emailed the survey invitation to a random sample of 2,417 heat pump customers (1,589 air-source and 828 ductless) from the population of 4,618 heat pump participants in the Trade Ally Solutions Program who received a rebate between July 1, 2023, and December 31, 2024. The team collected 436 responses for a response rate of 16%. Of those 436 respondents, 72% installed an air-source heat pump and 28% installed a ductless heat pump. For analysis purposes, the team included both partial and fully completed survey responses, which are noted throughout the report.

14.3.2. Design and Delivery

The midstream model of the Instant Discount Program relies on thoughtful market engagement of equipment distributors, dealers, and contractors/installers. Market actors promote the program through word of mouth and by distributing customer-facing program collateral. This is especially important within the water heating and HVAC sectors, where the program's focus is several steps above the end-use customer within the supply chain.

To ensure the program is accessible to all customers in Focus on Energy's territory, distributor enrollment is centered on the following goals:

- Ensure geographic coverage of Wisconsin by enrolling distributors serving all portions of the state.
- Ensure brand coverage by enrolling distributors who stock a diversity of brands, including historically popular brands, smaller brands with lower price points, and premium brands offering the highest efficiency equipment.

For water heating and HVAC measures, the evaluation team supplements the above goals by analyzing and understanding which contractors are engaged in the program to inform distributor enrollment priorities and contractor engagement strategy.

Within the commercial food service sector, Energy Solutions leverages a national food service account management team that strategically works to deliver savings to all food service programs it implements,

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including the Instant Discount Program. In particular, this team focuses on large-chain customers that tend to purchase equipment directly from manufacturers. They also work with manufacturer partners that sell directly to chains and other large customers, helping influence customer segments that energy efficiency programs have historically struggled to reach. They employ a managed-account approach to support chain and manufacturer-direct participants in commercial food service incentive programs across the country.

Incentives are fixed for all measures except commercial water heaters. A fixed incentive means the set rate must be passed along to the contractor and, ultimately, the customer. Additionally, participating distributors receive an incentive for each piece of equipment sold; the amount varies by equipment capacity. Distributors have the option to pass along their incentive amount to the contractor.

New construction projects are eligible for instant discounts; however, if those projects also participate in Residential New Construction, Energy Design Assistance, or Energy Design Review, the savings for those measures are removed from the program at the end of the year.

Increased discounts are available for heating and cooling equipment installed in income-qualified homes. Customers can apply for these incentives using the online Income Eligibility Application or by calling a program representative. CLEAResult verifies the income-qualified customers.

The program added several customer-facing marketing materials throughout CY 2024 and into CY 2025, with the goals of building end-use customer awareness of available instant discounts and promoting Focus on Energy brand affinity. Awareness-building materials included quarterly social media posts, and affinity-building efforts included a quarterly postcard to HVAC participants, reminding them of additional energy-saving opportunities from Focus on Energy.

14.3.3. Trade Ally Interview Findings

In September and October 2025, the evaluation team conducted in-depth interviews with 10 HVAC distributors, 10 HVAC contractors, and 10 food service distributors participating in the Instant Discount Program. This section presents the interview findings across several topics, including trade allies' profiles and comfort with high-efficiency equipment, satisfaction and expected benefits, and general recommendations from distributors. Where appropriate, this report compares CY 2025 HVAC distributor responses to responses from the CY 2024 HVAC distributor interviews.

Trade Ally Profiles

Food Service Distributors

Distributors reported where they sell equipment. Of the 10 food service distributors who participated in the interview, seven serve customers outside of Wisconsin and have a diverse clientele:

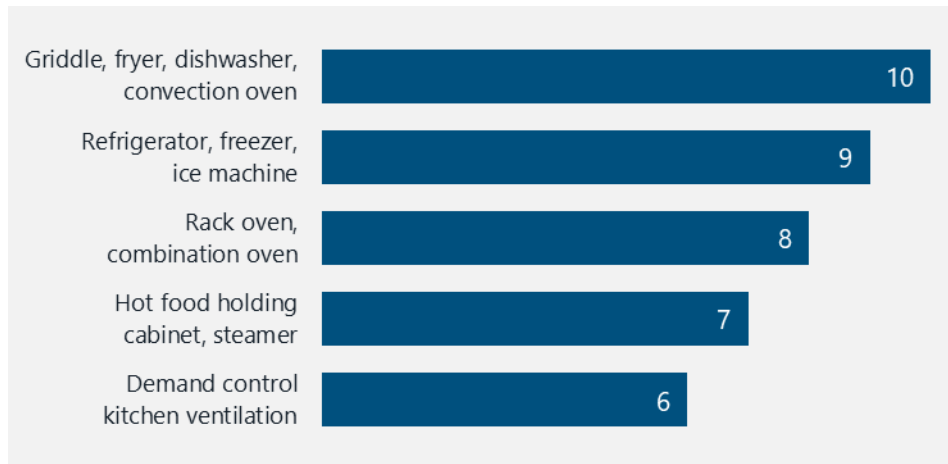
- Four sell 80% to 100% of their products to business owners/managers, with the most common business being restaurants (90%).
- One sells 80% of their products to contractors.

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- Two sell between a third and a quarter of their products to schools.
- One sells a small percentage of their products (10%) directly to residential customers.

As shown in Figure 116, all food service distributors sell griddles, fryers, dishwashers, and convection ovens, and almost all sell refrigerators, freezers, and ice machines.

Figure 116. Equipment Food Service Distributors Sell

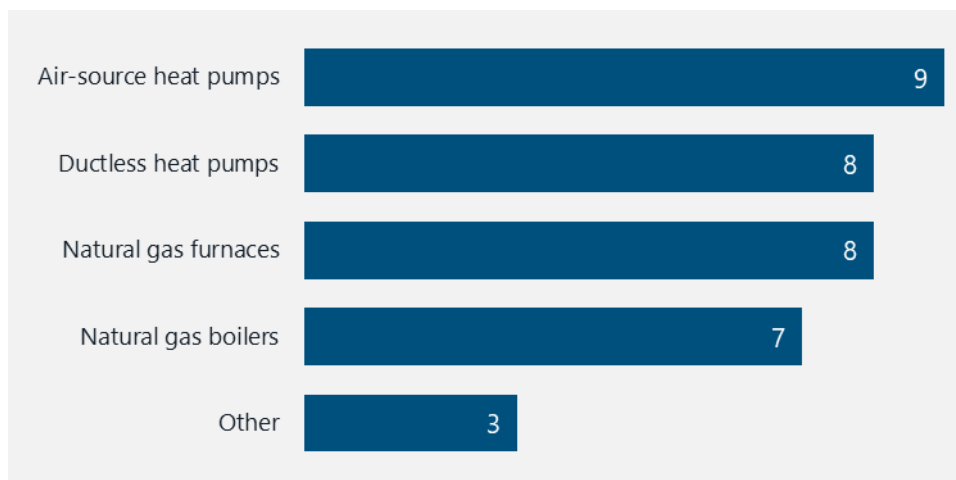


Source: Instant Discount Program Food service Distributor Interviews. “What type of food service equipment does your company sell?” (n=10)

HVAC Distributors

Of the 10 HVAC distributors who participated in the interview, nine serve customers outside of Wisconsin. Five HVAC distributors sell equipment only to contractors, while the rest reported selling a small percentage to retailers and homeowners as well. Among the 10 HVAC distributors interviewed, nine sell air-source heat pumps, eight ductless heat pumps and natural gas furnaces, respectively, and seven natural gas boilers (Figure 117).

Figure 117. Equipment HVAC Distributors Sell



Source: Instant Discount Program HVAC Distributor Interviews. “What type of HVAC equipment does your company sell?” (n=10)

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HVAC Contractors

The 10 interviewed HVAC distributors reported that their clientele comprises primarily homeowners and businesses:

- Seven contractors reported that homeowners are 80% of their clientele
- Two reported that homeowners are 50% of their clientele
- One reported that businesses are 70% of their clientele

All 10 HVAC contractors interviewed install natural gas furnaces and boilers, and nine install heat pumps. Six contractors were sales or administrative managers, two were the business owners, one was a client logistics specialist, and one was an install coordinator.

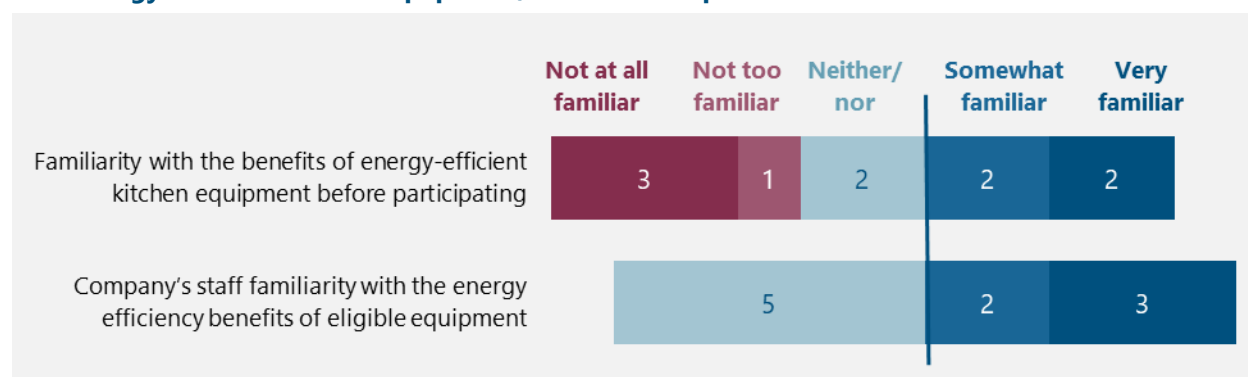
Familiarity and Comfort Level with Eligible Equipment

The interview included a battery of questions to assess the familiarity and comfort level of trade allies and end users with high-efficiency equipment and heat pumps. All questions assessing familiarity and comfort were presented on a scale of 1–5, where 1 was *not at all familiar* or *not at all comfortable*, 3 was *neither familiar nor unfamiliar* or neutral, and 5 was *very familiar* or *very comfortable*.

Food Service Distributors

Figure 118 reports how familiar food service distributors were with the benefits of energy-efficient kitchen equipment (specifically, those that are ENERGY STAR-certified) before participating in the Instant Discount Program, and how familiar their staff currently are with the energy efficiency benefits of eligible equipment. Responses were split regarding familiarity with ENERGY STAR-certified equipment, with four reporting that their staff were *familiar* and four reporting they were *not familiar*, while two were neutral. Additionally, half of the food service distributors (five) reported that their staff were familiar with the energy efficiency benefits of eligible equipment, while half said *neither familiar nor familiar*.

Figure 118. Food Service Distributors’ Familiarity with the Benefits of Energy Efficient Kitchen Equipment, Before Participation and at the Time of the Interview

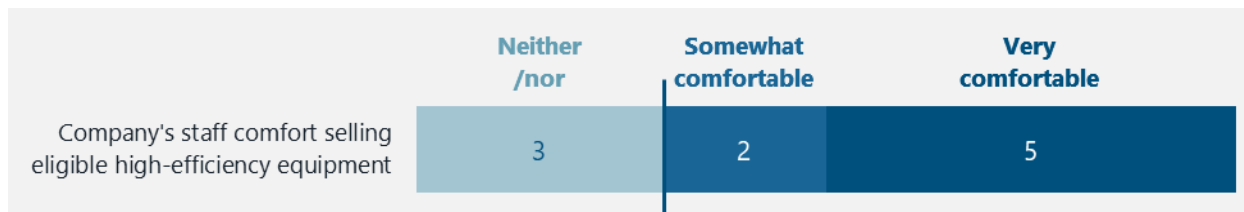


Source: Instant Discount Program Food Service Distributor Interviews. “Before participating in Focus on Energy’s Midstream and Instant Discount Programs, how familiar were you with the benefits of energy-efficient kitchen equipment, specifically, those that are ENERGY STAR certified?” (n=10) and “How familiar do you think your company’s staff is with the energy efficiency benefits of the eligible equipment?” (n=10)

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When asked about their staff’s comfort level with selling high-efficiency equipment, seven food service distributors said they were *somewhat* or *very comfortable* selling the high-efficiency equipment eligible for the program, and three were neutral (Figure 119).

Figure 119. Food Service Distributors’ Comfort with Selling Eligible High-Efficiency Equipment

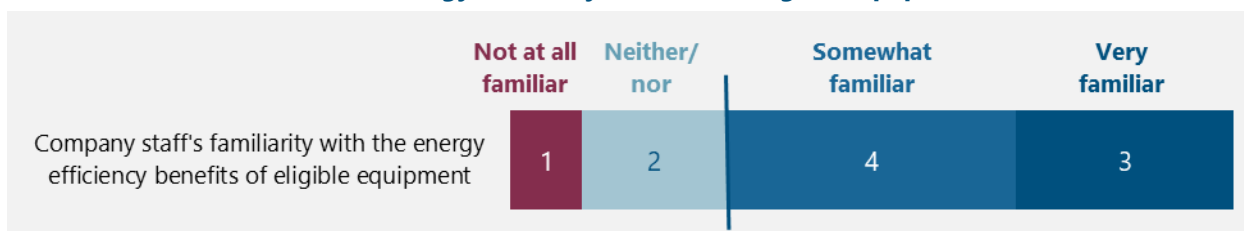


Source: Instant Discount Program Food Service Distributor Interviews. “How comfortable do you think your staff is with selling high-efficiency equipment that is eligible for the Instant Discount Program?” (n=10)

HVAC Distributors

In contrast to food service distributors, more HVAC distributors reported staff awareness of the energy efficiency benefits of eligible equipment. Seven reported some level of familiarity, two were neutral, and one was not at all familiar (Figure 120).

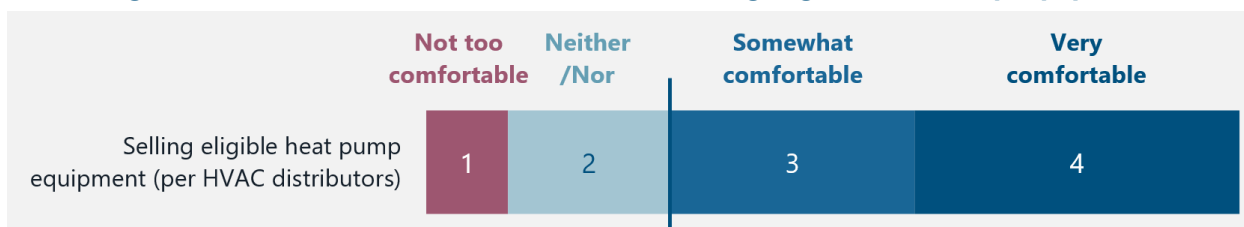
Figure 120. HVAC Distributors’ Staff Familiarity with the Energy Efficiency Benefits of Eligible Equipment



Source: Instant Discount Program HVAC Distributor Interviews. “How familiar do you think your company’s staff is with the energy efficiency benefits of the eligible equipment?” (n=10)

Seven HVAC distributors reported that their staff were *somewhat* or *very comfortable* selling heat pump equipment that was eligible for the program, two were neutral, and one said their staff was *not too comfortable* (Figure 121).

Figure 121. HVAC Distributors’ Staff Comfort Selling Eligible Heat Pump Equipment

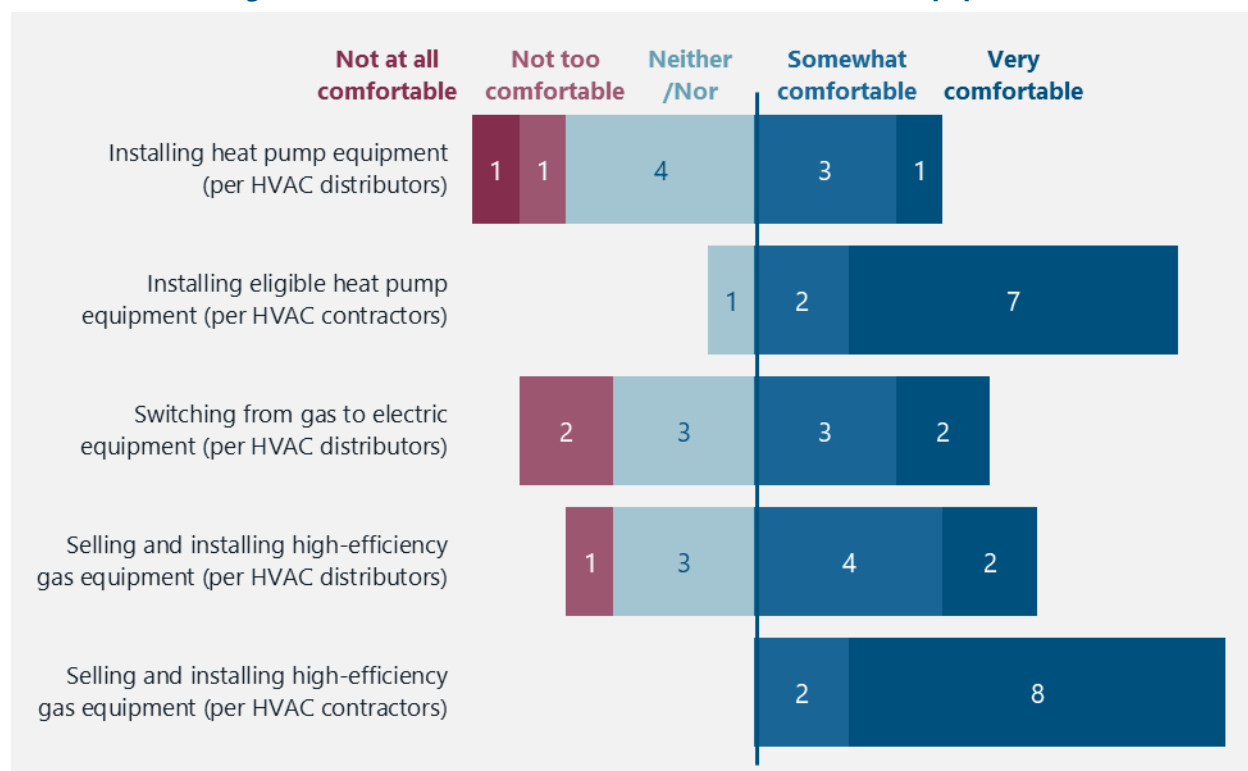


Source: Instant Discount Program HVAC Distributor Interviews. “How comfortable do you think your company’s staff is with selling heat pump equipment that is eligible for the Program?” (n=10)

HVAC Contractors

HVAC contractor interviews and HVAC distributor interviews asked about contractors' comfort with various equipment types. As shown in Figure 122, contractors reported a higher level of comfort than the distributors attributed to them. The first bar shows that only four distributors said contractors were comfortable installing heat pumps, while nine contractors (second bar) reported being comfortable installing them. When comparing HVAC contractors' comfort levels selling high-efficiency natural gas equipment, all 10 contractors reported some level of comfort (fifth bar), while only six distributors thought contractors were comfortable (fourth bar).

Figure 122. HVAC Contractors' Comfort with Different Equipment

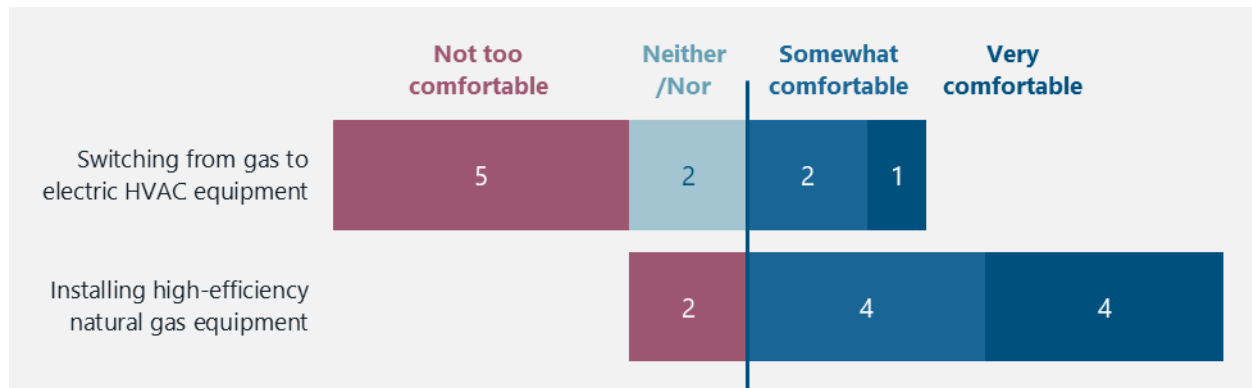


Source: Instant Discount Program HVAC Distributor Interviews. "How comfortable do you think contractors are with [eligible high-efficiency gas equipment/heat pump equipment/switching a home or business from gas to electric HVAC equipment]?" and "How comfortable do you think your company's staff is with selling high-efficiency gas equipment, such as furnaces and boilers, that is eligible for the program by highlighting its energy efficiency benefits?" Instant Discount Program HVAC Contractor Interviews: "How comfortable do you think your company's staff is with [selling eligible high-efficiency gas equipment by highlighting its energy efficiency benefits/selling eligible heat pump equipment]?" (n=10)

End-Use Customers

The interviews with HVAC contractors asked comfort assessment questions about contractors' customers (end users). The interview used the same 1–5 scale, where 1 was *not at all comfortable* and 5 was *very comfortable*. When asked how comfortable end users are switching from gas to electric HVAC equipment, five contractors thought their customers were *not too comfortable*, and three thought their customers were *very* or *somewhat comfortable*. In contrast, eight contractors said their customers were *somewhat* or *very comfortable* installing high-efficiency natural gas equipment (Figure 123).

Figure 123. End-Use Customers' Comfort According to HVAC Contractors



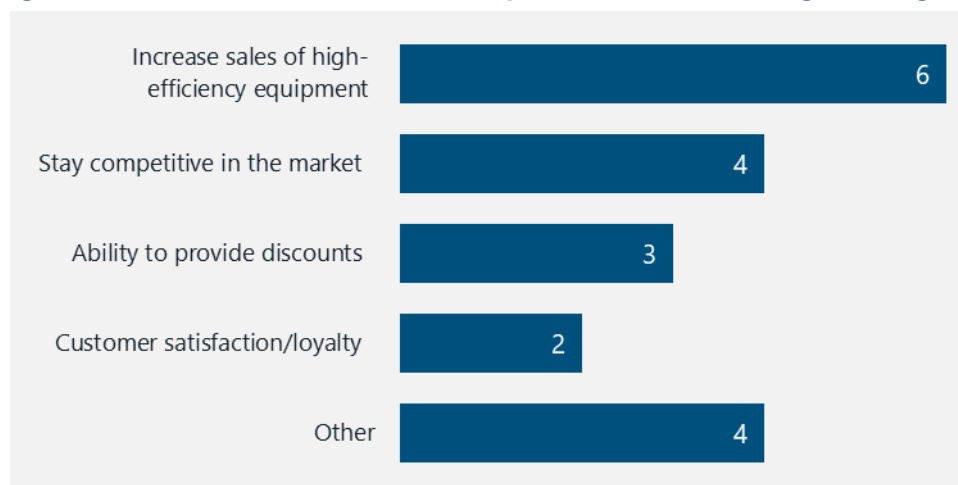
Source: Instant Discount Program HVAC Contractor Interviews. “How comfortable do you think your customers are with switching from gas to electric HVAC equipment, such as switching from a gas furnace to heat pump?” and “How comfortable do you think your customers are with high-efficiency natural gas equipment, such as boilers and furnaces, that is eligible for the Instant Discount Program?” (n=10)

Expectations, Concerns, and Satisfaction

Food Service Distributors

The evaluation team asked food service distributors about their expectations for participation. The majority (six) said that when enrolling in the program, they expected to gain the ability to increase sales of high-efficiency equipment, four expected to stay competitive in the market, and three expected the ability to provide discounts (Figure 124). Two also mentioned receiving spiffs (i.e., sales performance incentives), with one reporting, “Doing right by the environment,” and one wanting to build a relationship with Focus on Energy.

Figure 124. Food Service Distributor’s Expectations When Joining the Program



Source: Instant Discount Program Food Service Distributor Interviews. “When you became a participating distributor, what were the main benefits you expected?” (n=10)

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When asked if they were already experiencing those benefits in practice, seven food service distributors confirmed that they were. Two said that, as new participants, they did not know what to expect and had not seen benefits yet, while one did not respond. Three reported unexpected benefits, such as having a competitive advantage among peers (two) and the program serving as a good marketing tool (one).

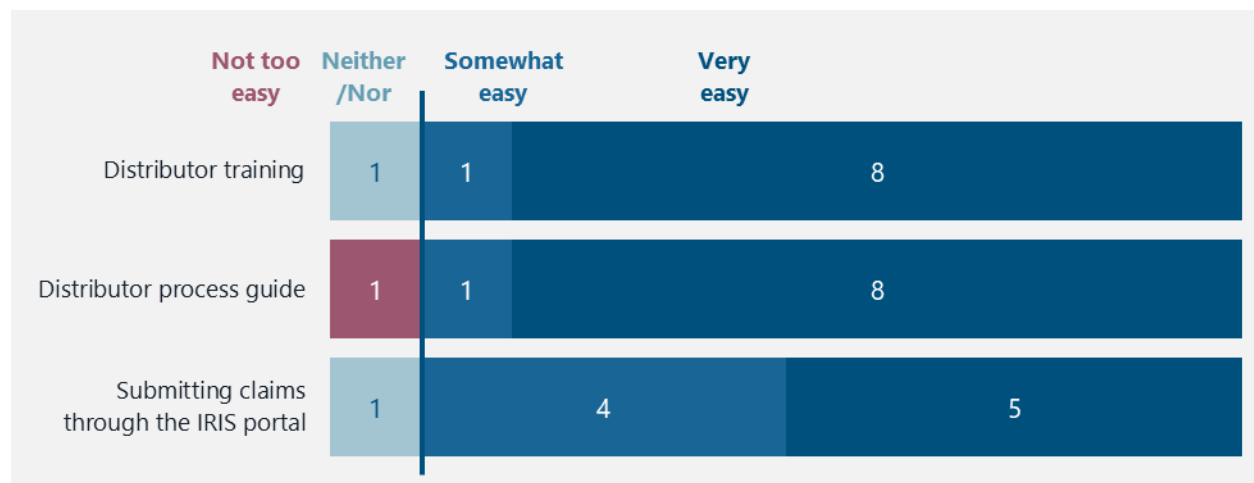
The evaluation team asked food service distributors if they had any concerns about participating in the program. Four of the 10 distributors reported having no concerns. Reported concerns from others included the following:

- Setting up and managing a point-of-sale system (two)
- Timeliness of reimbursement (one)
- The amount of the spiff/incentive (one)
- Participation requirements (one)
- Time required to participate (one)

The evaluation team asked food service distributors how satisfied they were with the level of communication from the Instant Discount Program staff using a scale of 1 to 5, where 1 is *not at all satisfied*, and 5 is *very satisfied*. Seven food service distributors were *very satisfied* (rating of 5), and three were *somewhat satisfied* (rating of 4).

When asked about training, the process guide, and the IRIS portal, the majority of food service distributors reported that the tools were *very easy* (rating of 5) or *somewhat easy* (rating of 4) to understand (Figure 125). The one distributor who said the process guide was *not too easy* to understand reported that the guide could be improved by explaining, “what do we need to be quoting to a customer, arming our sales team [with] the simplest form to get things done.”

Figure 125. Food Service Distributors: Ease of Training, Process Guide, and Submitting Claims

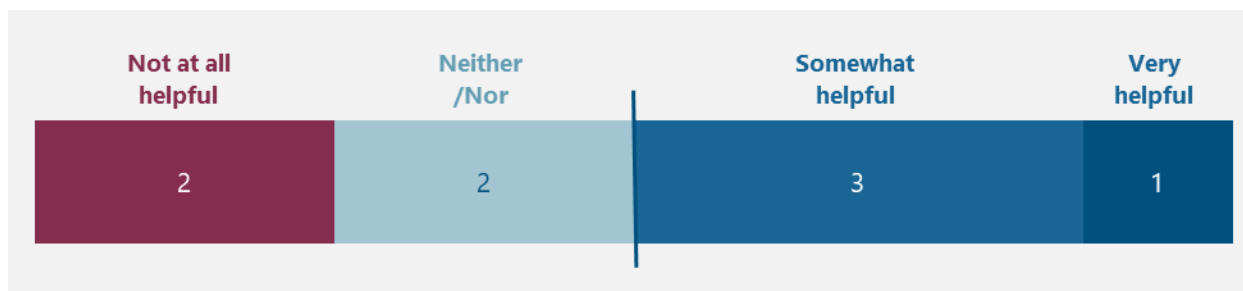


Source: Instant Discount Program Food Service Distributor Interviews. “How easy was it to [understand the distributor training/understand the distributor process guide/submit claims through the IRIS portal]?” (n=10)

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Opinions were more mixed regarding the marketing materials provided to food service distributors (Food Service Customer Flyer and Food Service Equipment Flyer). One distributor found the materials *very helpful*, three found them *somewhat helpful* (Figure 126), and two were neutral. Two distributors said they were *not at all helpful*, with one explaining they did not have a showroom, the other stating, “[the materials were] still sitting on a chair, they don't really capture the attention.”

Figure 126. Food Service Distributors: Helpfulness of Marketing Materials



Source: Instant Discount Program Food Service Distributor Interviews. “How helpful were the food service Marketing materials (Food Service Customer Flyer + Food Service Equipment Flyer)?” (n=10)

When the evaluation team asked food service distributors whether there was any efficient commercial kitchen equipment not currently eligible for incentives that they felt should be included in the program, seven said yes. Suggested additions to the program included coolers (Migali), ice machines (Hoshizaki), bakery ovens, convection ovens, and walk-in freezers and refrigerators. Responses varied widely on the estimated share of efficient commercial kitchen equipment not covered by the program. One respondent estimated 20%, another 40%; and a third said 30% to 40% as a high gap for certain products, such as refrigerators and freezers. Others suggested lower levels, including less than 15% and 5% to 10% (one each). Two respondents said they were not sure.

All food service distributors reported satisfaction with their overall experience with the program, with six *very satisfied* and four *somewhat satisfied*.

HVAC Distributors

When asked about their expectations when enrolling in the program, HVAC distributors’ responses varied significantly and included uncertainty about the level of effort required (two), changes to the “form/spreadsheet,” reducing the workload on their account managers, and the desire that more of their sales, especially of furnaces, went through the program (one each). One distributor said that they expected the program to be similar to other utilities’ midstream programs they are involved with. Three distributors said they were uncertain about participating due to issues they experienced in the previous Midstream Program; among these three, one cited having issues with the website in the past but added, “Now it is 95% better.”

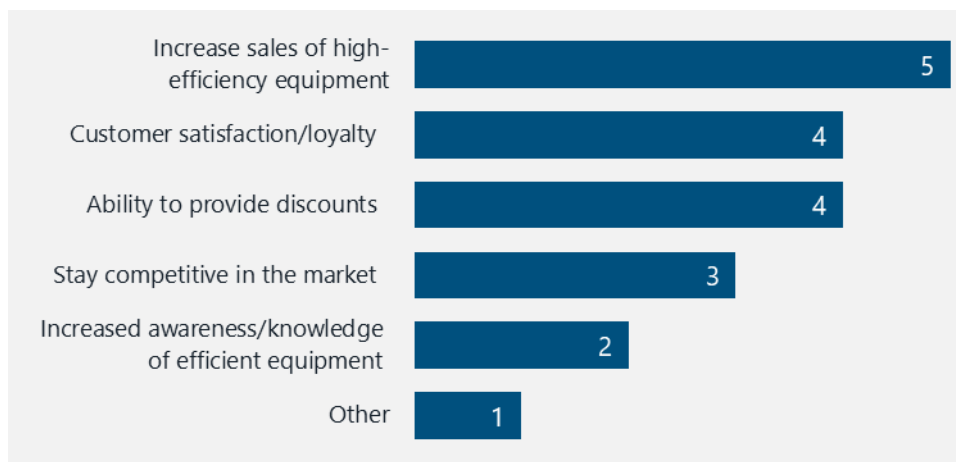
Nine HVAC distributors said that the program met their expectations and that they had a positive experience. One participant said that the program was “getting better with Energy Solutions’ help,” and others reported that it was easy to understand, or more efficient and user-friendly. Only one respondent

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said that the program did not meet their expectations and that it was difficult to understand which products qualified.

As shown in Figure 127, when asked what benefits they experienced, half of HVAC distributors (five) reported increased sales of high-efficiency equipment, followed by customer satisfaction (four) and the ability to provide discounts (four). None of the distributors reported experiencing no benefits.

Figure 127. HVAC Distributor’s Experienced Benefits



Source: Instant Discount Program HVAC Distributor Interviews. “What are the main benefits you have experienced from participating in the Instant Discount Program?” (n=10)
Multiple responses allowed.

When asked about concerns regarding participation, three HVAC distributors reported none. Of those who reported concerns, responses included the following (one response each):

- The previous experience with the Midstream Program was not positive
- The program was new and entailed eligibility changes, but added that the program’s trade ally manager was helpful in ameliorating their concern.
- Support from Focus on Energy
- Time required to participate
- Timeliness of incentive reimbursement
- Setting up/managing a point-of-sale system

Regarding the distributor-contractor relationship, eight distributors said the program had not changed their relationships with contractors, while two said it had strengthened their relationships. This is an improvement over the CY 2024 interviews, in which three distributors reported concerns that the Instant Discount Program was putting a strain on their relationships with the contractor.

“The program gave us another tool to build the relationship with contractors.”

-HVAC Distributor

The evaluation team asked distributors how satisfied they were with the level of communication from the Instant Discount Program staff, on a scale of 1 to 5, where 1 is *not at all satisfied*, and 5 is *very satisfied*.

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Seven of 10 HVAC distributors reported *very satisfied* (rating of 5), one was *somewhat satisfied*, and one was *neutral* (rating of 3). One distributor reported being *not at all satisfied* (rating of 1), stating that Focus on Energy could be more diligent in responding to emails.

Nine HVAC distributors answered a question about their satisfaction with their overall experience with the program. Seven HVAC distributors reported being *somewhat* or *very satisfied*. Only one was *somewhat dissatisfied*, and one was neutral.

HVAC Contractors

All 10 HVAC contractors reported they were aware of the Instant Discount Program, primarily through Focus on Energy sources such as Focus on Energy staff (seven) and Focus on Energy's website (eight; multiple answers were allowed). As discussed above regarding comfort levels, HVAC distributors underestimated contractors' program awareness in 2025. Only six distributors reported that contractors had any level of awareness about the program. This is slightly higher than the 2024 distributor interview responses, when four distributors thought that contractors were aware. Note that contractors were not surveyed in 2024 for comparison. When asked whether someone told them about the instant discounts at the point of purchase, two HVAC contractors said they were informed, six said they were not informed, and two did not remember or did not know.

The interview also asked HVAC contractors about the distributors they work with. Eight contractors said they only work with distributors participating in the program, one said they work with some participating distributors but not exclusively, and one did not know. Nine contractors said that program participation

"The distributor does have the best interest of the contractor in mind. They make sure that the forms are getting sent in timely, and monies are credited back in a timely manner."

-HVAC Contractor

did not affect the distributors they chose to work with, explaining that the brand, not the program, influenced their choice of distributors. They also noted that they already had a well-established network of distributors, and the program is a bonus, not a deciding factor. One contractor, however, stopped working with a distributor after learning the distributor did not offer Focus on Energy's instant discount.

When asked what had gone well in their relationships with distributors, contractors reported that distributors were collaborative and responsive, had good rebate portals, were timely in program processes, and had improved the forms compared to last year.

When asked what could improve their relationships with distributors, contractors suggested more consistent contact from distributors, with one specifying a "heads up... like Focus on Energy does," faster turnaround of payments, and standardized forms for the submittal process.

Six HVAC contractors reported some level of satisfaction with the program (Figure 128). Three contractors reported some

"I think the new program has put a burden on the distributor."

-HVAC Contractor

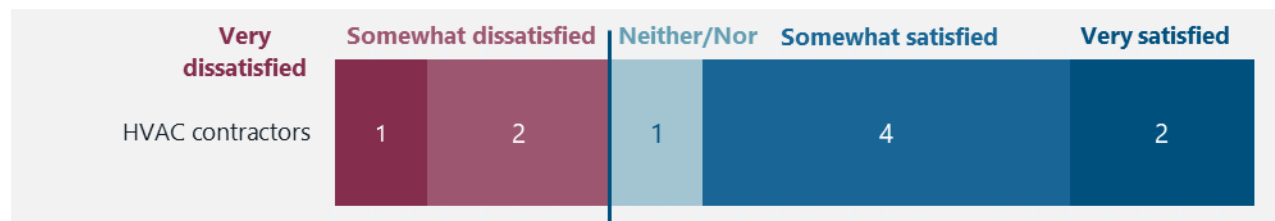
"My only complaint is that the program [made us] change how we do the accounting. [There is] nothing really that I love about it now."

-HVAC Contractor

dissatisfaction with the program, citing the need to provide program-required data to distributors, the discount levels, and the need to confirm equipment eligibility. One of them said that the program changed how they did the accounting, making it more complex. However, most contractors reported being satisfied with those requirements:

- Six were satisfied with the process of providing program-required data to distributors
- Five reported satisfaction with the rebate levels
- Seven with the process for confirming equipment eligibility

Figure 128. HVAC Contractors’ Satisfaction with the Instant Discount Program



Source: Instant Discount Program Interviews, HVAC Contractor Interviews. “How satisfied are you with your overall experience with the Instant Discount Program?” (n=10)

The five contractors who reported dissatisfaction with rebate levels were asked how much of the incremental cost of efficient equipment incentives should be covered to maintain sales: one said 90%, one 60%, and one 20%. Two contractors said they did not know. When asked how much discounts should increase to encourage purchase, the five contractors dissatisfied with rebate levels cited the following:

- Double to triple across the board
- Boilers 50%; furnaces 400%; thermostats 100%
- Double for furnaces
- Triple for furnaces
- Thermostat and furnaces 50%

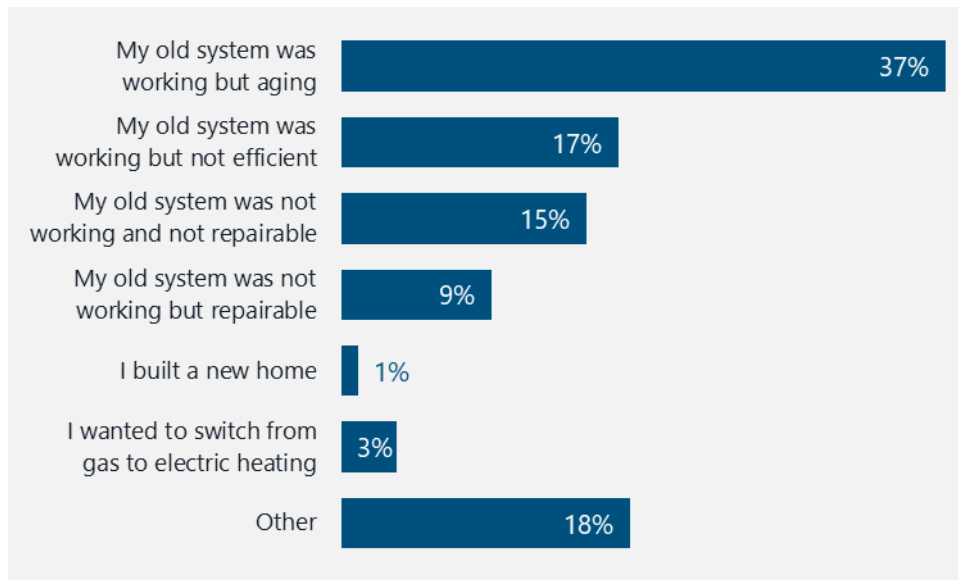
14.3.4. Heat Pump Participant Survey Findings

This section presents results from a survey of Trade Ally Solutions Program participants who installed a heat pump in late CY 2023 or early CY 2024. The evaluation team collected survey data in late 2025 to ensure that each participant had experienced at least one full heating season with their equipment. Findings cross several topics, including awareness and motivations, experience and benefits, equipment and switchover temperature information, contractor experience, and demographic profile. The section reports results organized by research objective that met a 90% confidence level or higher.

Awareness and Motivations

When asked why they needed new HVAC equipment, customers most frequently reported that their old systems were still working but aging (37%) or were inefficient (17%). Fifteen percent of respondents said their equipment was not repairable, and 9% said their equipment could have been repaired (Figure 129).

Figure 129. Reason Why Participants Installed New Equipment

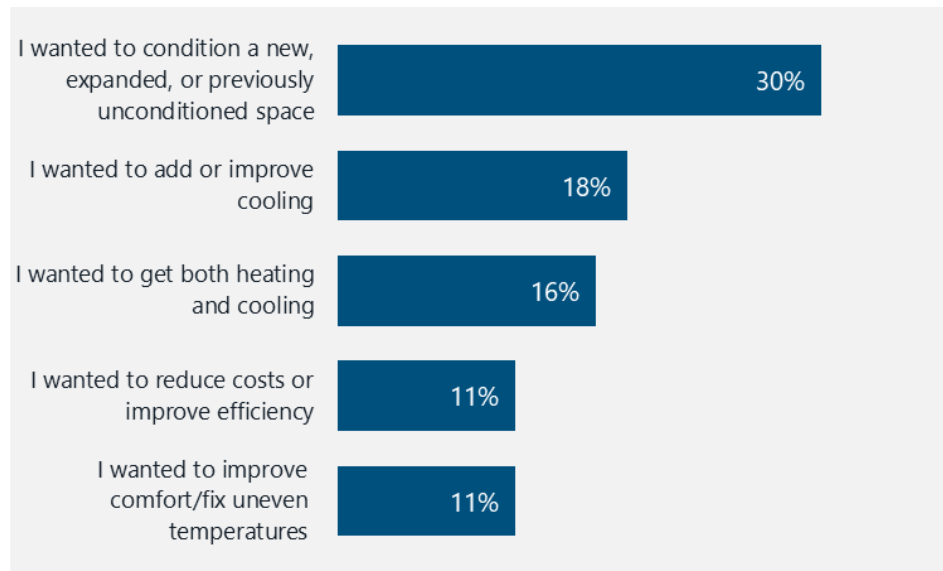


Source: Heat Pump Participant Survey. “Why did you install new HVAC equipment?” (n=414)

When looking at responses by equipment type, air-source heat pump participants said the main reason they installed new equipment was that their old system was working but aging (49%, n=303). Air-source heat pump participants were significantly more likely to select this option than ductless heat pump participants ($p < .05$).

Ductless heat pump participants’ reasons for installing equipment largely fell into the “other” category (47%, n=113). Among the 56 ductless users who followed up with details (Figure 130), the largest percentage of respondents wanted to condition a new, expanded, or previously unconditioned space (30%), followed by wanting to add or improve cooling (18%) and wanting to get both heating and cooling (16%); 14% offered responses that were difficult to categorize and were thus labeled miscellaneous

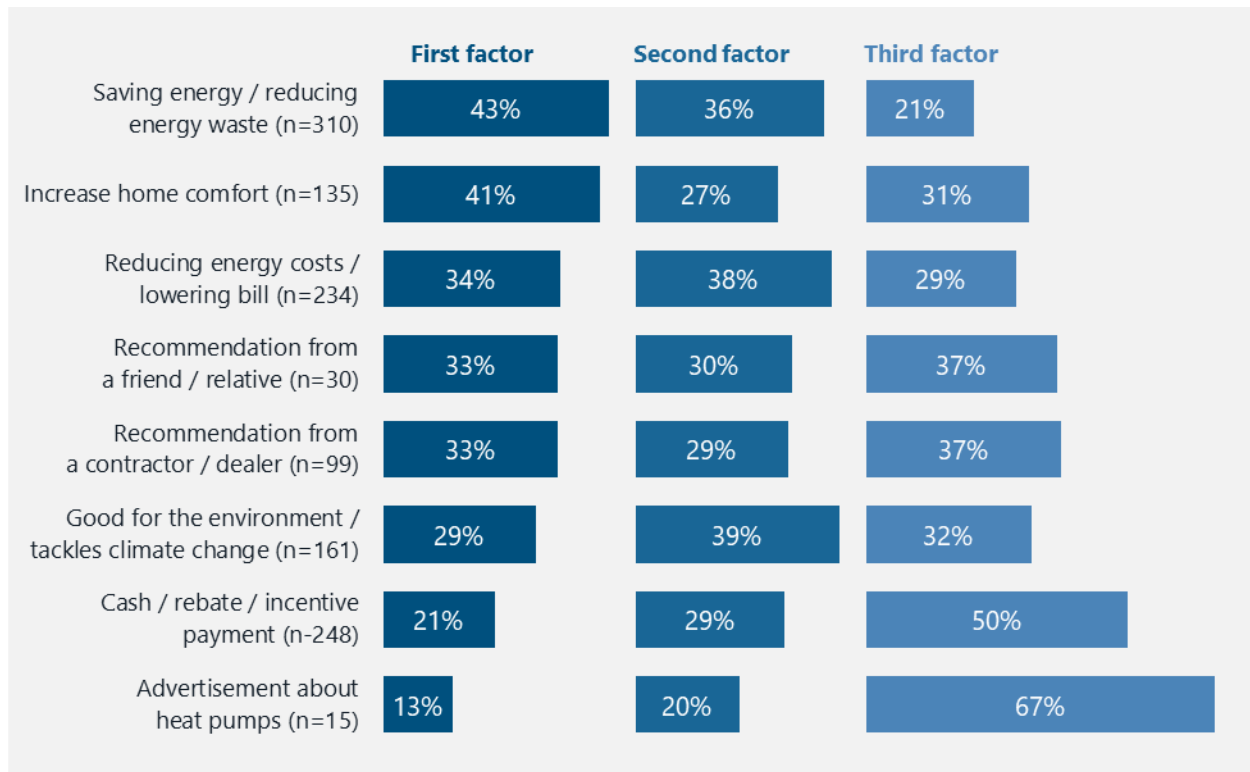
Figure 130. Reason Why Ductless Users Installed New Equipment



Source: Heat Pump Participant Survey. “Why did you install new HVAC equipment?” (n=56).

The survey also asked customers to rank their top three reasons for buying and installing a heat pump. Figure 131 shows the percentage of respondents who included each factor in their top three, broken down by whether they chose it as their first, second, or third reason. Each respondent chose three factors, so the chart does not sum to 100% across all factors. Saving energy and improving home comfort were the main factors across respondents, with more than four out of 10 choosing each as a top driver. Receiving a rebate was important, but usually as a secondary or tertiary factor rather than the main reason. Reducing energy costs or lowering bills ranked higher than incentives, with approximately three out of 10 choosing bill savings as a top driver. Overall, regardless of ranking order, saving energy, reducing energy costs, and incentive payments were the most frequently selected motivating factors for purchasing a heat pump, whereas advertisement and recommendation from distributors were among the least motivating factors.

Figure 131. Top Three Motivations for Purchasing a Heat Pump, Ranked

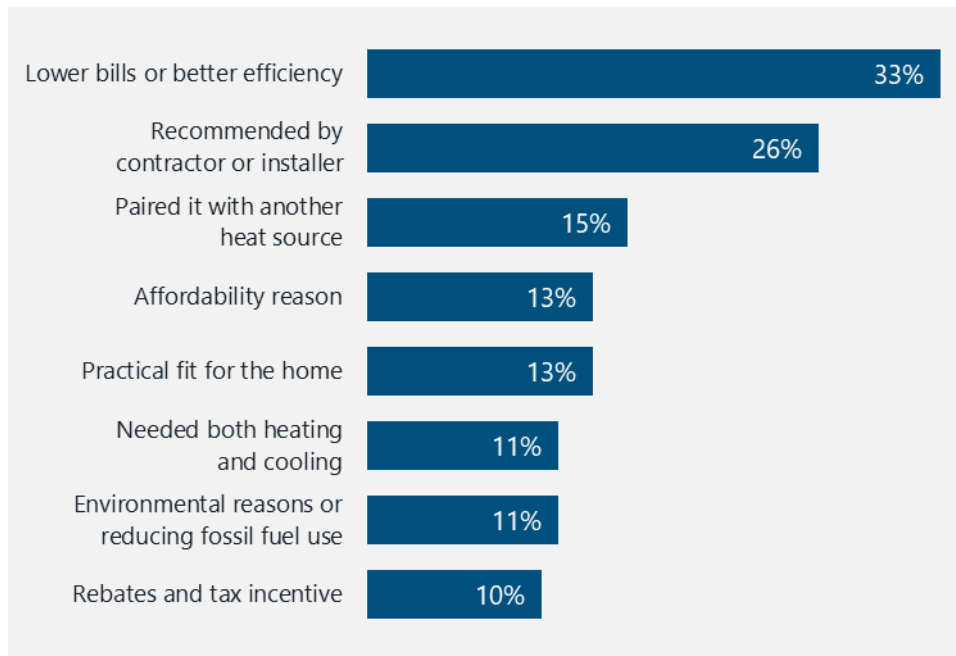


Source: Heat Pump Participant Survey. “Select and rank the 3 most important factors that motivated you to purchase your heat pump.” (n=416)

The survey asked respondents if, at the time of their purchase, they considered other types of equipment. Among those who installed air-source heat pumps, 63% (n=294) also considered installing other types of equipment. Of those who considered alternative equipment (120), 33% said gas furnaces, 38% central AC, and 22% said both. Among those who installed ductless heat pumps, 37% (n=112) considered other types of equipment, namely room/window/wall AC (50%), central/whole-house HVAC or central air (30%), portable AC (7%), and fireplace or propane unit heaters (7%).

Among the respondents who explained why they installed an air-source heat pump instead of the other equipment they considered (Figure 132), the most common reasons were reducing bills or improving efficiency (33%) and recommendations from contractors/installers (26%). Less common responses included pairing the heat pump with other heating and/or cooling sources, affordability, practicality, environmental reasons, and rebates/incentives.

Figure 132. Reasons for Installing Air-Source Heat Pump

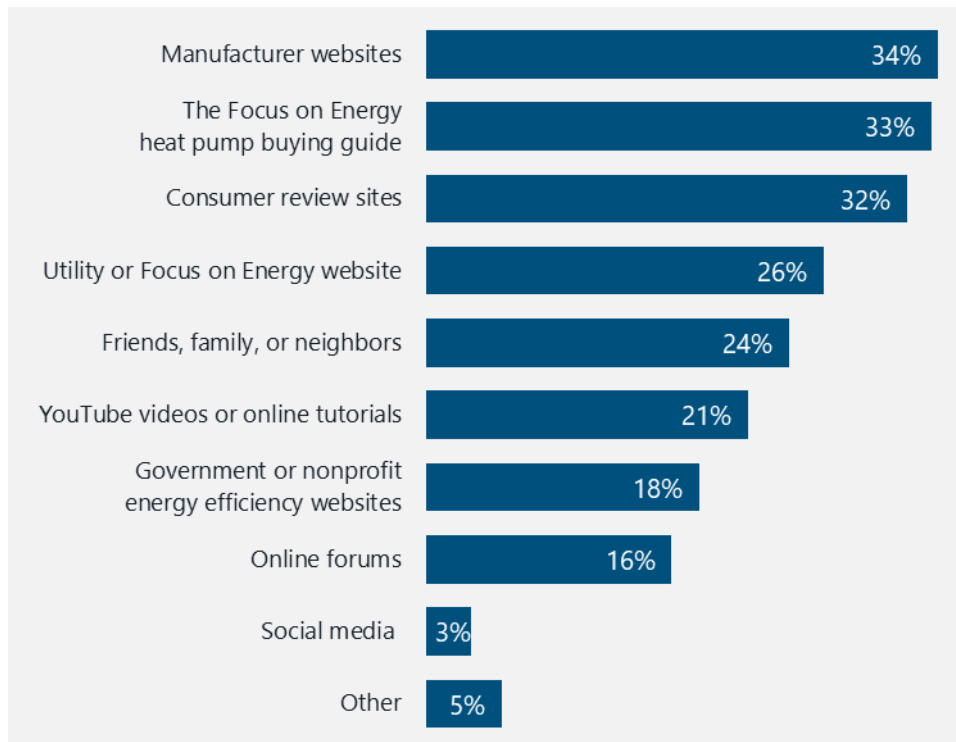


Source: Heat Pump Participant Survey. “Our records indicate that you purchased an air-source heat pump. Why did you choose the air-source heat pump instead of the other equipment?” (n=278) Percentages do not add up to 100% because the question was an open-ended response, which allowed respondents to provide multiple reasons.

When asked how much research they did before purchasing a heat pump, half of the respondents (50%) reported doing a moderate amount of research. About one-quarter (23%) said they did a lot of research, including in-depth comparisons and reviewing technical information, while 21% did a little research. Only 6% reported doing no research before deciding to purchase a heat pump (n=412).

As a follow-up, the survey asked respondents who conducted research what resources they used to learn about the pros and cons of heat pumps before deciding to install one. Figure 133 shows that contractors and installers were the most influential, with manufacturers and program resources serving as key supplementary information channels. About one-third of respondents (33%) consulted Focus on Energy’s heat pump buying guide, and almost all who consulted it found it *very* or *somewhat* helpful (95%). The leading resource cited under the “other” category was the TV show *This Old House* (36%). When asked to choose only one resource, 47% (n=324) of respondents singled out the contractor as the most important resource they consulted to learn about the pros and cons of heat pumps.

Figure 133. Resources Participants Consulted Before Installing Their Heat Pump



Source: Heat Pump Participant Survey. “Which of the following resources did you consult about the pros and cons of heat pumps before deciding to install a heat pump?” (n=387) Multiple responses allowed. Before or at the time of installation, most respondents were aware that their heat pump system might be eligible for a federal tax credit: 91% said they were aware, while 9% said they were not aware. When asked whether they received a federal tax credit, 93% reported that they did, and 7% reported that they did not.

User Experience and Benefits

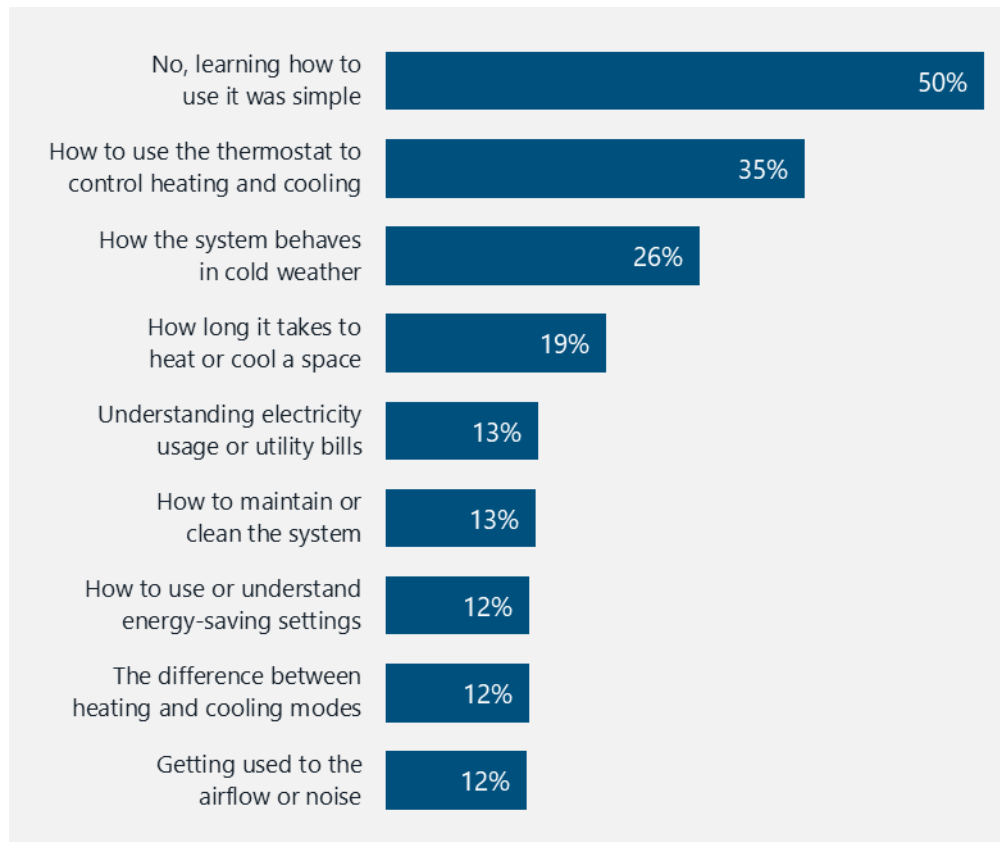
The evaluation team asked participants whether they had experienced a learning curve to figure out how to use their system. As Figure 134 shows, half of the respondents (50%) reported no learning curve. The top three areas of learning were how to use the thermostat (35%), how the system behaves in cold weather (26%), and how long the system takes to heat or cool a space (19%). Ductless users were more likely than air-source users to report needing to learn things like warm-up time, mode differences, and maintenance ($p < .05$). There were no other significant differences between groups.

“Everything is run through a remote, which has its own learning curve.”

“I still can't figure out how to get back into the contractor settings to change the temperature threshold.”

-Trade Ally Solutions Heat Pump Participants

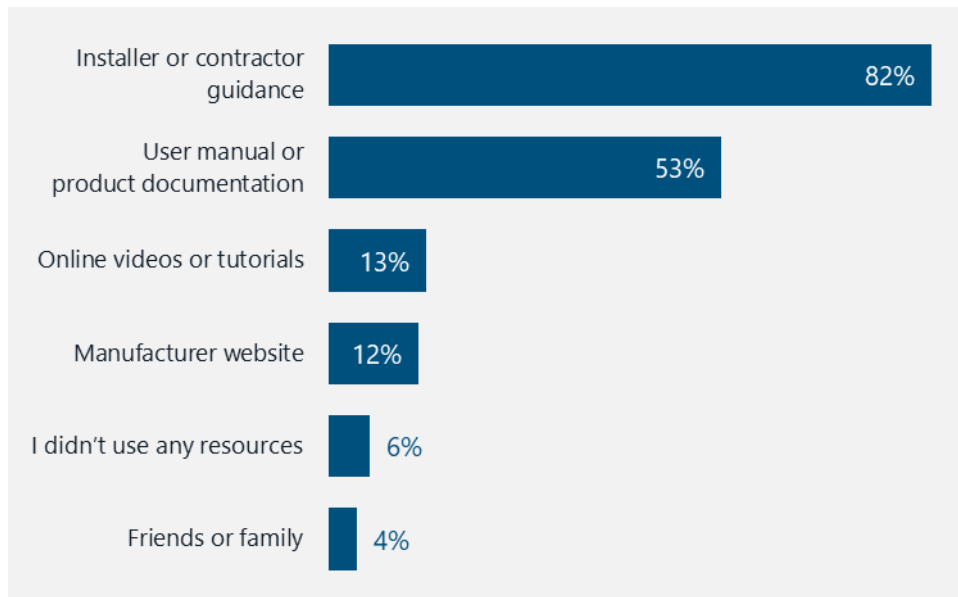
Figure 134. Participants’ Learning Curve when First Using Their Heat Pump



Source: Heat Pump Participant Survey. “When you first started using your heat pump, did you experience a learning curve to figure out how to use it?” (n=405) Multiple responses allowed.

The survey also asked participants how they learned to operate their systems (Figure 135). Most participants (82%) said they learned from their contractor or installer, followed by the user manual (53%). Only a small number of participants consulted online videos (13%) or the manufacturer’s website (12%).

Figure 135. Resources Participants Used to Learn How to Operate their Heat Pump



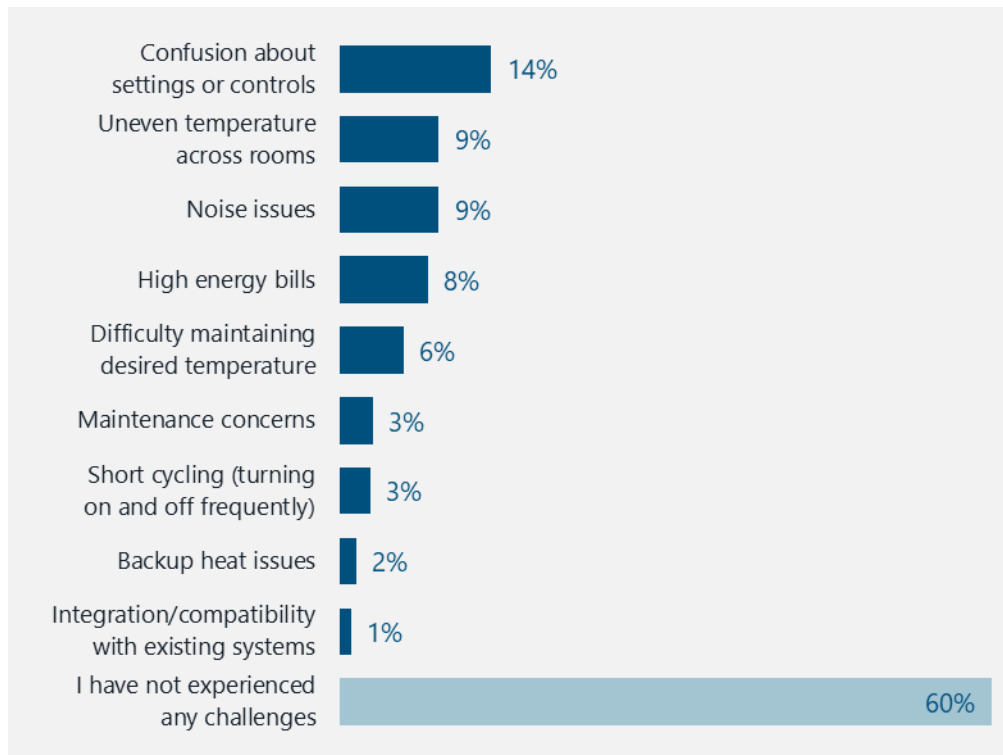
Source: Heat Pump Participant Survey. “What resources, if any, did you use to learn how to operate the system?” (n=408) Multiple responses allowed.

When asked what challenges participants faced operating their heat pump once installed (Figure 136), most (60%) reported no challenges. The most common challenge reported was confusion about settings or controls (14%), followed by noise issues (9%), uneven temperatures across rooms (9%), and high energy bills (8%). A group comparison revealed that air-source heat pump users experienced more noise issues ($p < 0.05$) than ductless users.

“The switchover temperature was set too low initially and had to do a call back to change it up to 35° from 20°.”

-Trade Ally Solutions Heat Pump Participant

Figure 136. Challenges Participants Faced while Operating their Heat Pump



Source: Heat Pump Participant Survey. “Have you experienced any challenges operating your heat pump?” (n=395) Multiple responses allowed, unless the respondent selected, “I have not experienced any challenges.”

To understand whether participants’ experiences matched their expectations, the survey asked respondents what benefits they expected before installing their heat pump and what benefits they have experienced since using it. This paired set of questions allowed the evaluation team to compare anticipated versus realized benefits and identify where outcomes aligned or fell short of what participants hoped to gain.

“[An unexpected benefit is] peace of mind from greater reliability of a new heating/cooling system.”

-Trade Ally Solutions Heat Pump Participant

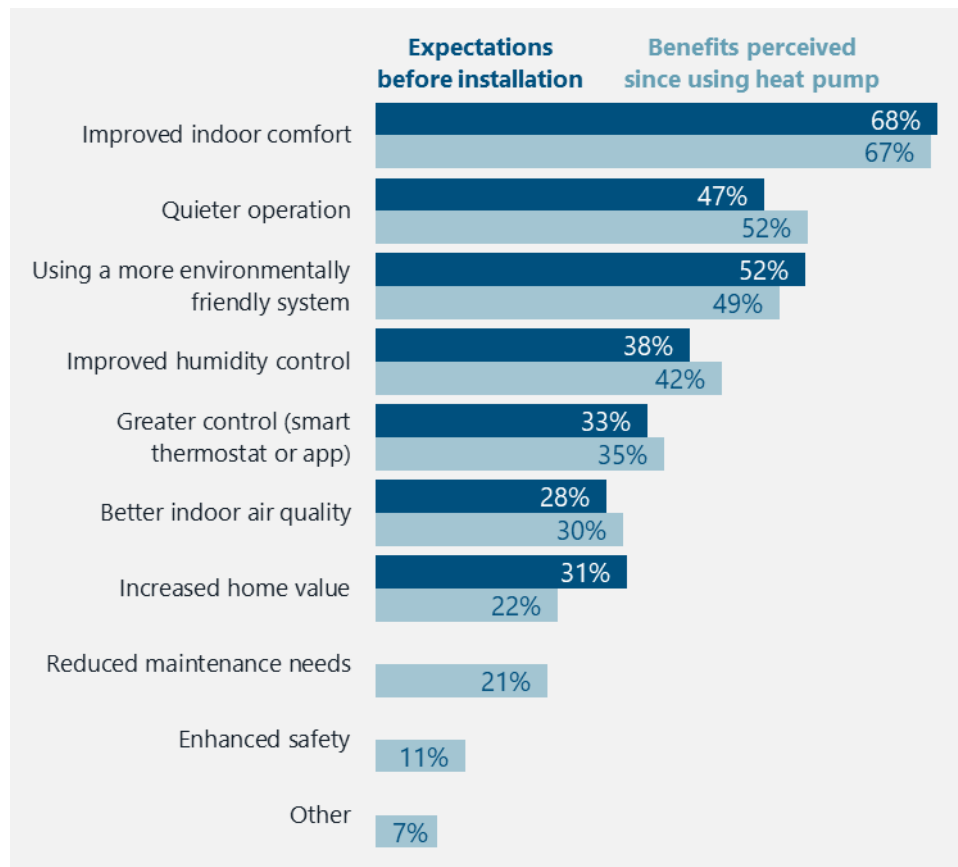
Most participants said the main benefits they expected were better comfort (68%), environmental benefits (52%), and operational performance (47%), which largely coincided with benefits they reported experiencing (67%, 49%, and 52% respectively) (Figure 137). For most reported benefits, the actual benefit

“Zone specific HVAC is complicated, but [the heat pump] provides lovely control once understood.”

-Trade Ally Solutions Heat Pump Participant

exceeded expectations, except for improved comfort, environmental benefits, and increased home value. Participants also reported unexpected benefits, including enhanced safety and reduced maintenance needs. Among those who reported realizing other benefits (7%), more than half reported lower bills and lower operating costs.

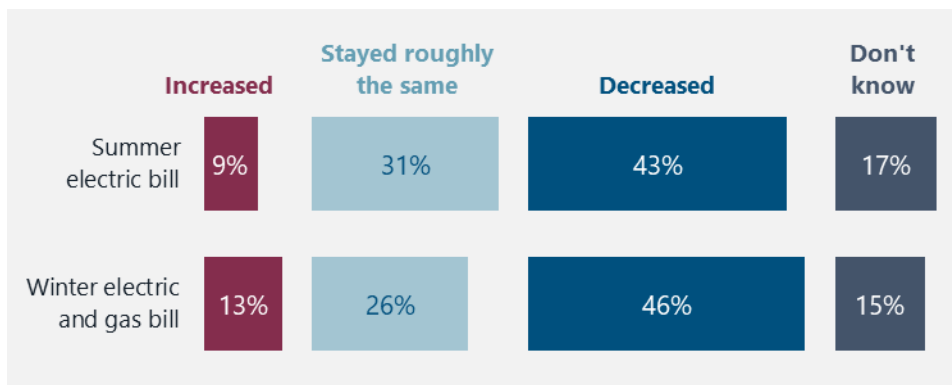
Figure 137. Expectations Before Installing the Heat Pump and Benefits Experienced After Installation



Source: Heat Pump Participant Survey. “Before using your heat pump, which of the following benefits did you expect? Select all that apply.” (n=406) and “Since using your heat pump, which of the following benefits have you actually experienced?” (n=403) Multiple responses allowed.

The survey asked air-source heat pump participants who replaced a natural gas furnace whether their summer and winter electric and gas bills have changed since installing the heat pump (Figure 138). Participants’ bill experiences were mixed but leaned positive; most reported lower seasonal bills in both the summer (43%) and winter (46%). This was followed by their bills staying the same (31% summer) and (26% winter). A minority reported that their bills went up 9% in the summer and 13% in the winter, and another notable minority reported not knowing in either season.

Figure 138. Summer and Winter Bill Impacts of Air-Source Heat Pump Users

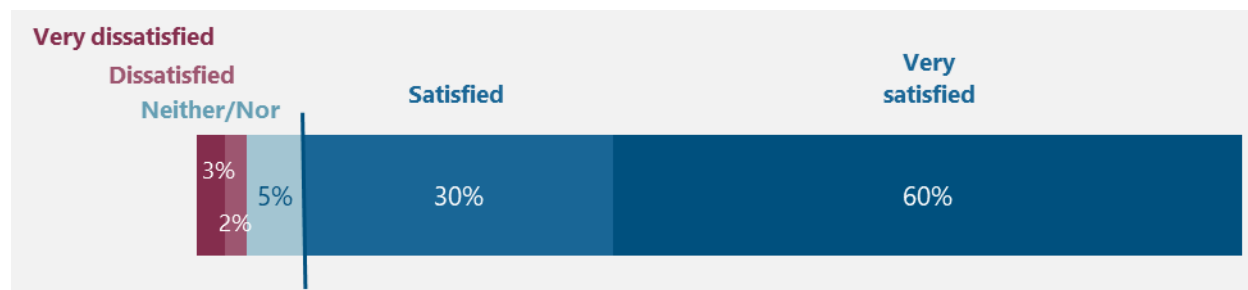


Source: Heat Pump Participant Survey. “How has your electric bill changed during the summer months since installing your heat pump?” and “How has your combined electric and gas bill changed during the winter months since installing your heat pump?” (n=127)²⁶

Of the 71 people who responded to a follow-up question about changes to their bills, 81% expected the changes and were satisfied, or did not expect them but were pleasantly surprised. Nineteen percent were dissatisfied with the changes, whether expected or unexpected.

Overall satisfaction with the heat pump was high (90%) and did not differ significantly by heat pump type (Figure 139). Only 5% of respondents were *dissatisfied*, and another 5% were neutral. The evaluation team found a significant relationship between information and satisfaction, as those who conducted “a lot” of research before installation and those whose contractor clearly explained the pros and cons of heat pumps were significantly more likely to report being *very satisfied* with their system ($p < 0.05$).

Figure 139. Overall Satisfaction with the Heat Pump



Source: Heat Pump Participant Survey. “Overall, on a scale of 1 to 5, where 1 is *very dissatisfied* and 5 is *very satisfied*, how satisfied are you with your heat pump?” (n=406)

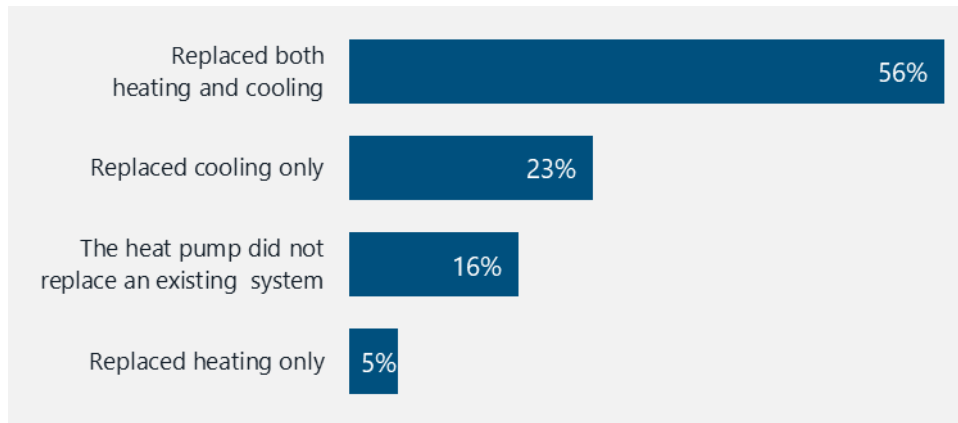
²⁶ Seasonal impact questions had a lower n because they were designed to isolate the effect of switching from a working, efficient gas furnace to a heat pump on household bills and satisfaction. The question also excluded new-construction homes, since those customers do not have a meaningful “before” bill for that house and would be comparing to a hypothetical or a previous residence. As a result, the analysis focused on retrofits where the only major change was the heating system.

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Equipment Information and Switchover Temperature Information

The evaluation team asked what equipment the heat pump replaced. In most cases (56%), the replacement was part of a more comprehensive replacement, replacing both cooling and heating equipment (Figure 140).

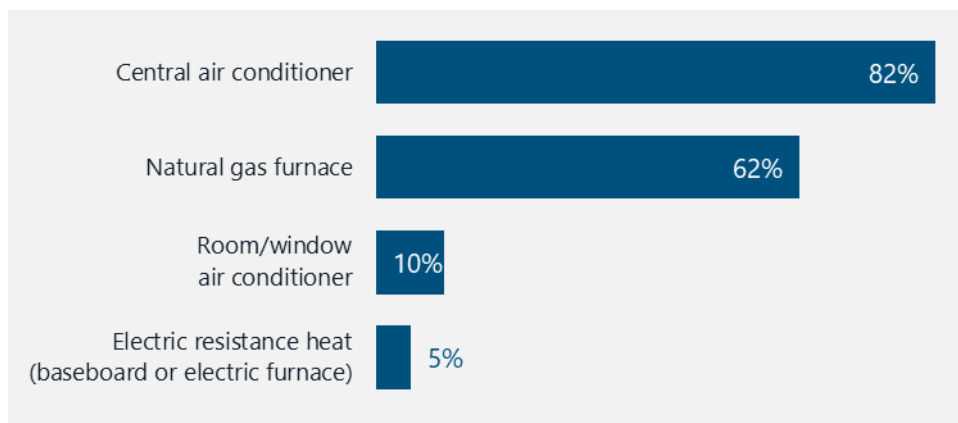
Figure 140. Equipment that the Heat Pump Replaced (Heating or Cooling)



Source: Heat Pump Participant Survey. “Did the new heat pump replace existing heating or cooling equipment?” (n=412)

Respondents who reported replacing equipment were then asked what type of equipment the new heat pump replaced. The majority (82%) reported replacing a central air conditioner, and 62% replaced a gas furnace (Figure 141).

Figure 141. Type of Equipment that the Heat Pump Replaced



Source: Heat Pump Participant Survey. “What type of equipment did the new heat pump replace?” (n=406) Multiple responses allowed.

The survey asked air-source heat pump users whether their new equipment used a backup heating source on cold days; 93% said yes and 7% said no (n=281). Among those with a backup source, 85% use a

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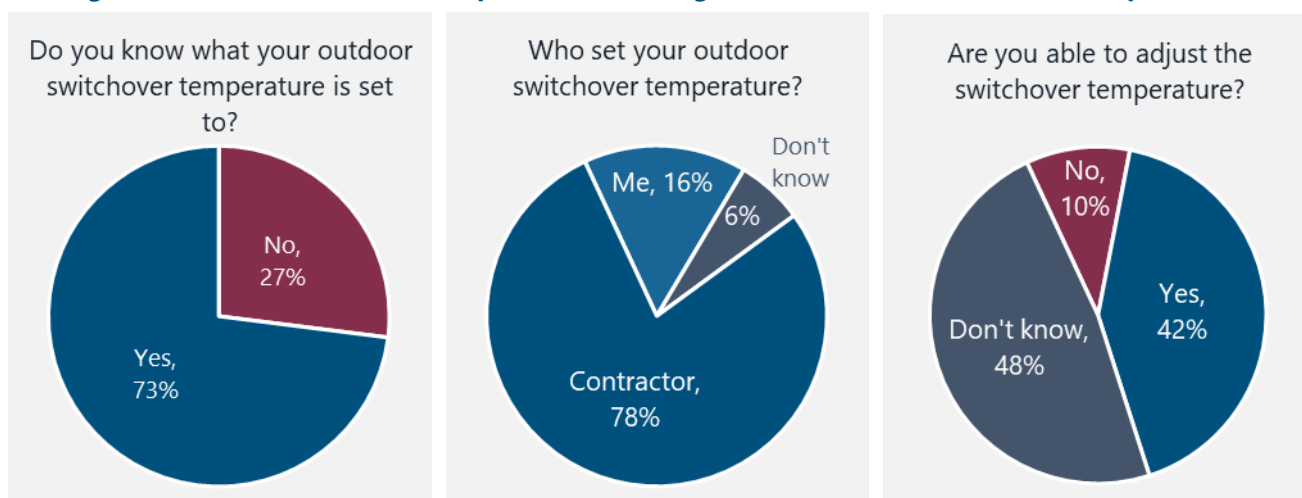
natural gas furnace, 8% use a propane or LP furnace, and 5% said “other.” Two-thirds of the respondents who reported “other” said they used electric backup heat.

Most participants reported that their supplemental furnace was new and installed at the same time as the air-source heat pump (88%, or 239). The remaining respondents provided the age of their existing furnace in years (12%). Among the 28 respondents who provided a furnace age, 50% reported a furnace that was five years or newer. Another 21% reported using a backup furnace that was six to 12 years old, and the remaining 29% reported it was 15 to 23 years old.

The survey asked air-source heat pump participants who use a backup heating source about their awareness of the switchover temperature, or the outdoor temperature at which the heat pump switches to the backup heating source. Most respondents said their contractor explained the switchover temperature during installation (86%, n=263). In contrast, 7% said the contractor did not explain it, and 7% said they did not know.

Seventy-three percent of the air-source heat pump participants with backup heat reported knowing what their outdoor switchover temperature was set to (Figure 142) and 78% reported that their contractor set the outdoor switchover temperature. While these results reflect some knowledge about the switchover temperature, almost half of the respondents (48%) did not know whether they could adjust it themselves, and fewer than half (42%) said they would be able to change it.

Figure 142. Air-Source Heat Pump Users’ Knowledge about Outdoor Switchover Temperature



Source: Heat Pump Participant Survey. “Do you know what your outdoor switchover temperature is set to?” (n=262), “Who set your outdoor switchover temperature?” (n=248), and “Are you able to adjust the switchover temperature?” (n=230)

Although no air-source heat pump participants provided their switchover temperature, 59 ductless heat pump participants reported the temperature at which their heat pumps switch to a backup heating system. Of those respondents, the most common switchover range was above 40°F (29%), followed by 21°F to 30°F (25%), and 11°F to 20°F (17%).

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Across all survey respondents, nearly half reported setting their thermostats between 68°F and 70°F (49%) in the colder months, followed by 65°F to 67°F (29%, n=408). Fewer participants reported setting it between 71°F and 73°F (15%) or below 65°F (7%), and very few reported setting it to 74°F or higher (1%).

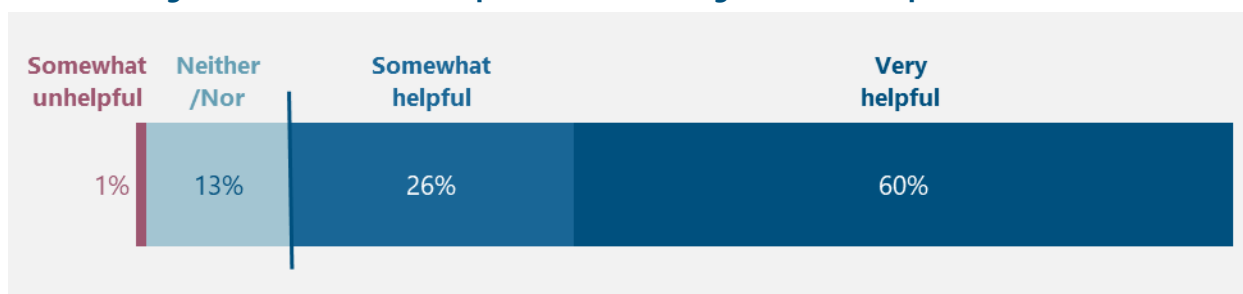
On the installation side, only 15% of respondents needed an electrical upgrade at the same time as their heat pump installation (n=409). Among those who had an upgrade (n=63), 57% installed a new dedicated circuit for the heat pump, 38% installed a panel upgrade, and 36% installed a circuit or wiring upgrade. Respondents who had electrical upgrades were asked how the upgrades affected their overall experience with their heat pump installation. Roughly four in 10 (43%, n=62) reported that it added extra cost, 30% perceived no impact, and 20% were more confident that their home was ready for future electrification.

A total of 67% of participants (n=400) reported having to install other equipment at the same time as their heat pump. Most respondents (n=241) reported installing thermostats or control-related equipment (79%), followed by a furnace (20%) and indoor air add-ons such as humidifiers, dehumidifiers, air cleaners/filters, or sensors (11%). A few participants reported installing air handlers/ductwork or related components (8%), and the remaining cited miscellaneous equipment such as an additional heat pump, generator, surge suppressor, inverter, or remote (12%).

Contractor Experience

Nearly all respondents (98%, n=406) worked with a contractor to install their heat pump. The majority found the contractor *somewhat helpful* (26%) or *very helpful* (60%) in deciding whether the heat pump was a good fit for their home (Figure 143).

Figure 143. Contractor Helpfulness in Deciding if a Heat Pump was a Good Fit



Source: Heat Pump Participant Survey. "How helpful was the contractor in helping you decide whether a heat pump was a good fit for your home?" (n=400)

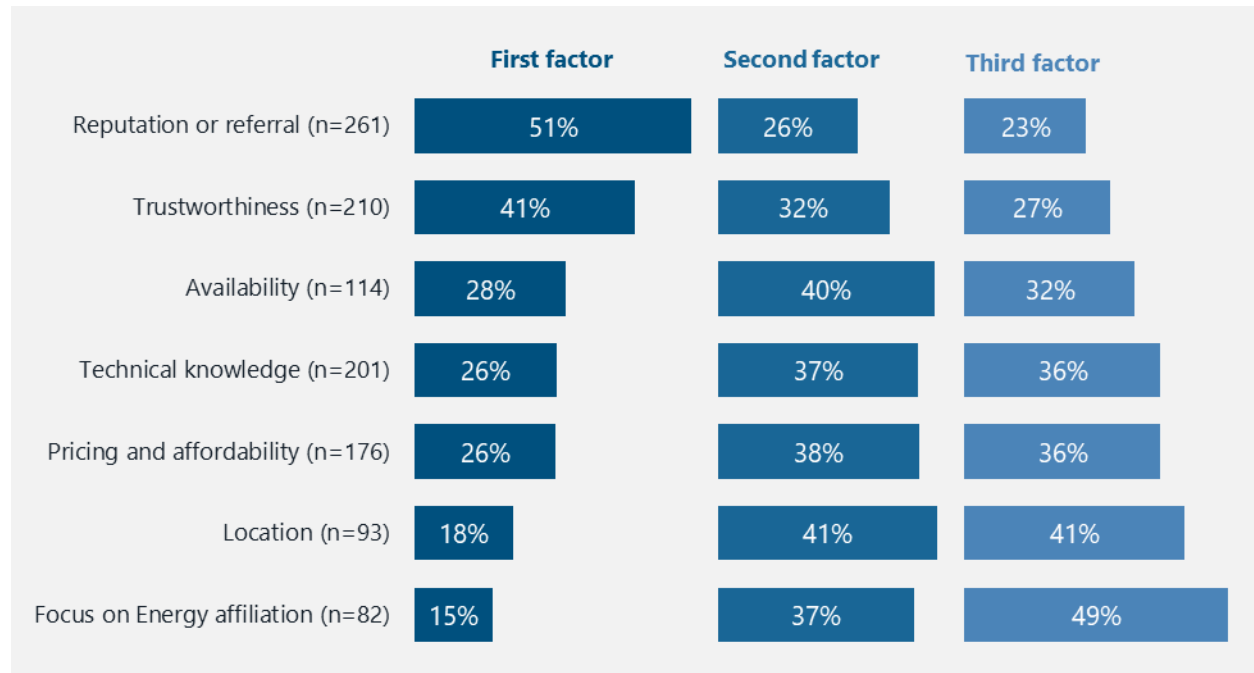
Among those who worked with a contractor, 89% reported that the contractor talked to them about the pros and cons of installing a heat pump system (n=391), 87% reported that the contractor provided training on how to use their heat pump (n=392), and 67% said that contractors discussed how the heat pump may affect their energy bills (n=373).

When asked how they found their contractor, nearly half of the respondents had used the same contractor previously (48%, n=398), while 16% found a contractor through referrals from family or friends. One-fifth (20%) did personal research to find a contractor, and a few cited contractor advertising (6%) or other methods (7%). Very few respondents used Focus on Energy channels (3%) (the website Find a Trade Ally tool or a utility representative), and 2% found a contractor through a retailer/store.

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When asked to rank their top three reasons for choosing a contractor, participants most often ranked reputation/referral as their first reason (n=396), followed by trustworthiness (41%), which were also the reasons selected most frequently regardless of ranking order. Participants more commonly reported technical knowledge and pricing/affordability as second or third priorities. Figure 144 summarizes the percentage of respondents who ranked each category as a first, second, or third factor.

Figure 144. Top Three Reasons to Select a Contractor, Ranked



Source: Heat Pump Participant Survey. “Please rank your top three reasons for choosing your contractor, with 1 being the most important.” (n=397)

Most respondents said it was easy to find a contractor they felt was knowledgeable about heat pumps: 52% rated it *very easy* and 24% rated it *somewhat easy* (n=395). About 17% said it was *neither easy nor difficult*, while 6% rated it *somewhat difficult* and 1% rated it *very difficult*. Among the minority who found it difficult and provided additional details (n=25), the most common challenges were:

- Contractor knowledge gaps (difficulty finding someone up to date on heat pump technology, able to offer cold-weather units, or able to service/adjust systems) (32%)
- Contractor resistance or reluctance (contractors saying they “don’t do” heat pumps, trying to talk them out of installing one, or giving outdated/negative advice) (32%)

“We went to three contractors before finding the one we chose. All said that heat pumps don't work in cold weather, even though I was specifically asking for a cold-weather heat pump. They didn't understand the switch-over temperature, and they also fearmongered us about our bills rising. The contractor we chose had installed heat pumps before and had positive customer experiences with them. It was disheartening to have to disprove and correct contractors about this proven technology, and it took us much longer than we would have liked to find a contractor that we could trust.”

-Trade Ally Solutions Heat Pump Participant

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- Limited availability or responsiveness (few options in the area, limited service areas, not getting callbacks) (28%).

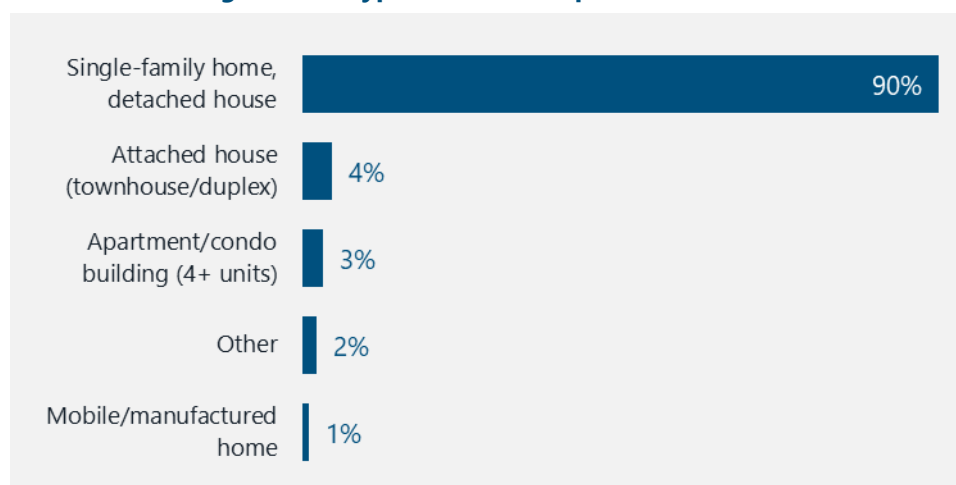
A majority of participants rated overall satisfaction with the contractor experience highly (91%), with 75% *very satisfied* and 16% *somewhat satisfied*. Only a small percentage of participants provided neutral or negative ratings, with 5% *neither satisfied nor dissatisfied*, 2% *somewhat dissatisfied*, and 2% *very dissatisfied*.

Demographic Information

Over half of participants (66%) said the heat pump was their main source of heating and cooling in the home, and about a third (34%) said it was a secondary heating source (n=398). Most participants reported heating their homes with natural gas (71%, n=134), followed by propane (11%) or wood (8%). Only a small percentage of participants reported electricity (5%), other fuel types (5%), and oil (2%).

As illustrated in (Figure 145), most respondents live in single-family homes (90%) and own their homes (99%; n=399). Only 1% of respondents reported their home was new construction (n=416).

Figure 145. Type of Home Respondents Live In



Source: Heat Pump Participant Survey. "What type of home do you live in?" (n=397)

Respondents were generally highly educated. Most reported a graduate or professional degree (39%), followed by a bachelor's degree (32%) and some college with no degree (12%) or an associate's degree (9%). Five percent reported they were high school graduates (including GED). No respondents reported less than a high school education, and 3% preferred not to answer (n=395). In contrast, the United States Census data indicates that approximately 33% of Wisconsin residents 25 years of age or older hold a

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Bachelor’s degree or higher,²⁷ suggesting that heat pump participants are skewed toward higher education than the average of the population of Wisconsin.

Table 138 shows the distribution of survey respondents across participating utilities. The table is limited to utilities that accounted for at least 1% of respondents. Nearly half of the respondents were served by We Energies (Milwaukee area) or Madison Gas and Electric (Madison area). Alliant Energy (south central Wisconsin) and Wisconsin Public Service (Fox Valley area) each accounted for over 10% of respondents. Outside of the utilities listed here, the remaining respondents were evenly distributed across another 25 utilities.

Table 138. Respondent Geographic Distribution

Utility	Share of Respondents
We Energies	27%
Madison Gas and Electric Company	20%
Wisconsin Power and Light (Alliant)	17%
WPS (Wisconsin Public Service)	12%
Xcel Energy (Northern States Power)	9%
Adams-Columbia Electric Cooperative	2%
Sun Prairie Utilities	1%
Wisconsin Rapids Waterworks & Light	1%
Mount Horeb Utilities	1%
Kaukauna Utilities	1%
Dahlberg Light & Power Company	1%
Oconomowoc Utilities	1%
Scenic Rivers Energy Cooperative	1%

14.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a DSM offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III includes a description of the TRC test. Table 139 lists the CY 2025 incentive costs for the Instant Discount Program.

Table 139. CY 2025 Instant Discount Incentive Costs

Offering	Incentive Costs
Instant Discount - Residential	\$5,213,441
Instant Discount - Business	\$1,294,500
Total	\$6,507,941

²⁷ U.S. Census Bureau. July 1, 2025. *QuickFacts: Wisconsin*. <https://www.census.gov/quickfacts/fact/table/WI/EDU635223>

The evaluation team found that the CY 2025 Instant Discount Program was cost-effective (1.27). Table 140 lists the evaluated costs and benefits.

Table 140. CY 2025 Instant Discount Costs and Benefits

Cost and Benefit Category	Total
Costs	
Administration Costs	\$328,947
Delivery Costs	\$3,835,479
Incremental Measure Costs	\$21,547,871
Total Non-Incentive Costs	\$25,712,296
Benefits	
Electric Benefits (kWh)	-\$659,291
Electric Benefits (kW)	\$2,603,358
T&D Benefits (kW)	\$747,360
Gas Benefits	\$19,553,220
Emissions Benefits	\$10,411,965
Total TRC Benefits	\$32,656,614
Net TRC Benefits	\$6,944,318
TRC Benefit/Cost Ratio	1.27

14.5. Outcomes and Recommendations

This section outlines the current outcomes and recommendations based on feedback from HVAC and food service distributors and HVAC contractors regarding the sale and support of high-efficiency equipment, as well as their experiences with the Instant Discount Program and related processes. It also includes findings and recommendations based on survey responses from customers who installed a heat pump.

Outcome 1. Food service distributors entered the program with relatively low baseline familiarity with the benefits of energy-efficient equipment, but awareness increased. About half of food service distributors reported their staff were *neither familiar nor unfamiliar* with the ENERGY STAR efficiency benefits of the eligible equipment. However, food service distributors reported high comfort levels selling eligible high-efficiency equipment after participating in the program, suggesting that the program increased awareness.

Recommendation 1. During monthly visits, remind food service distributors of the available resources, such as training webinars and FAQs, so they can continue to confidently promote efficient equipment.

Outcome 2. Satisfaction is high among food service and HVAC distributors. Those in the food service industry are highly satisfied and report that the program gave them a competitive advantage compared to their peers. HVAC distributors were more likely to report satisfaction with higher sales and customer loyalty.

Outcome 3. Contractors think that their customers are less comfortable switching from gas to electric and more comfortable with high-efficiency gas equipment. The majority of HVAC contractors (eight) reported that their customers are comfortable installing high-efficiency natural gas equipment. However, only three said their customers are comfortable switching from gas to electric HVAC equipment.

Recommendation 3. Use the midstream channel to target the fuel-switching comfort gap by developing electrification-focused sales tools with case studies and projected benefits. Equip contractors and distributors with customer-facing switch messaging: simple scripts, FAQs, and visuals that address cold-weather performance, backup heat strategy, expected comfort, and bill impacts. Include a “myth vs. fact” section related to cold-climate heat pump concerns.

Outcome 4. While the program has not affected which distributors HVAC contractors work with, contractors reported a positive, collaborative relationship with distributors. This finding alleviates concerns that HVAC distributors reported in CY 2024 about the Instant Discount Program potentially deteriorating relationships with their customers.

Outcome 5. HVAC distributors underestimate contractors’ heat pump readiness, yet contractors are customers’ primary source of heat pump information and strongly influence satisfaction.

Distributors perceived contractors as less comfortable selling and installing heat pumps (and high-efficiency gas equipment) than contractors reported; fewer than half of the interviewed distributors said contractors were comfortable installing heat pumps, whereas nearly all contractors said they were comfortable. This perception gap matters because contractors strongly shape their customers’ understanding of and satisfaction with heat pumps: most heat pump participants found contractors very helpful in deciding whether a heat pump was a good fit (60%) and almost half cited contractors as their most important learning resource (47%). In addition, two-thirds (67%) of customers said their contractor discussed how heat pumps may affect energy bills.

Recommendation 5a. Use the Instant Discount Program to align distributors and contractors on contractor readiness and strengthen contractor-facing heat pump sales education, especially for fuel-switching conversations that customers rely on. During monthly distributor visits, share evidence that contractors report high comfort with installing and selling eligible products, and/or convene a joint distributor–contractor calibration session (virtual or regional) to establish shared definitions of what “comfortable” means, for example, sizing, cold-climate performance, controls, and switchover/backup operation.

Recommendation 5b. Equip contractors with a concise heat pump toolkit and quick-reference materials that directly support consistent customer education, including required talking points on: (1) cold-climate performance, (2) backup/switchover operation (including dual-fuel scenarios), (3) bill expectations, and (4) available rebates and federal tax credit eligibility. Provide examples of customer profiles where heat pumps are a strong fit and leave-behind materials contractors can share with customers to reinforce accurate, unbiased guidance.

Outcome 6. Most customers who installed a heat pump reported lower seasonal energy bills, while relatively few reported bill increases. More than 80% of respondents were satisfied or pleasantly surprised with bill impacts, while 19% were dissatisfied or concerned.

Recommendation 6. Place greater emphasis on using a “Bill Impacts at a Glance” one-pager for distributors that summarizes bill impacts in plain language and graphics and provides quick bill-impact reference tables with typical bill outcomes for common situations (e.g., by home type, fuel, or usage). This simple bill-impact tool may improve expectation-setting and post-install support, for example, by including short “how to interpret your first winter” guidance. To ensure that this information is accessible to contractors and customers, the availability of this tool should be promoted and marketed directly to contractors and customers

Outcome 7. Additional education and research are necessary to understand switchover temperatures in dual-fuel heat pumps. Switchover temperatures have a significant impact on savings achieved from dual-fuel heat pumps. Although a large majority (86%) of dual-fuel air-source heat pump survey respondents recalled their contractor explaining the switchover temperature, nearly half did not know whether they could adjust it, and switchover temperature settings were unclear.

Recommendation 7. Encourage contractors to provide additional end-user education on the switchover temperature and how it affects energy usage. Consider creating educational materials that could be included in the toolkit (see Recommendation 5b).

Outcome 8. Overall, MMTBU realization rates were over 100%, but many individual measures did not achieve 100% realization. In some cases, *ex ante* values were derived from historical TRMs or could not be verified.

Recommendation 8. To ensure accuracy in savings estimates, review project documentation thoroughly and ensure the appropriate MMID and TRM are applied and referenced.

15. Renewable Rewards

The Renewable Rewards Program promotes the installation of solar PV measures through two offerings: the Residential offering and the Business offering. Through both offerings, the program pays incentives to customers who install qualified solar PV systems in their homes or businesses. The Residential and Business offerings also feature a Rural Renewables Bonus, available to customers located in designated rural ZIP codes.

APTIM administered the Renewable Rewards Program in CY 2025, and the implementer, CLEAResult, conducted the day-to-day operations. Additional details about program design are provided in the *Process Evaluation* section of this chapter.

Table 141 summarizes the Renewable Rewards Program's impacts for CY 2025, including impacts of each of the Residential and Business offerings and the program as a whole. The Business offerings contributed 62% to the overall gross lifecycle MMBtu savings and the Residential offering contributed 38%.

Table 141. CY 2025 Renewable Rewards Program Summary

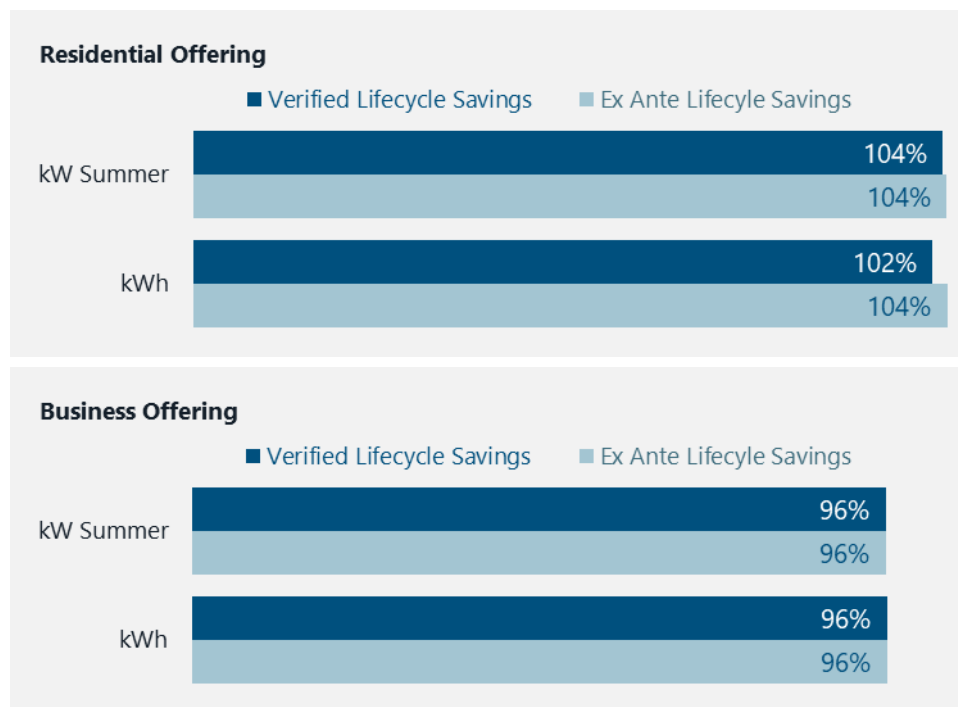
Item	Units	Residential Offering	Business Offering	Total Program
Incentive Spending	\$	\$1,068,759	\$1,718,361	\$2,787,121
Participation	Number of Participants	2,167	203	2,370
Verified Gross Lifecycle Savings	kWh	730,354,527	873,014,567	1,603,369,094
	kW Summer	5,631	6,410	12,041
	kW Winter	2,806	3,725	6,531
	Therms	0	0	0
Verified Gross Lifecycle Realization Rate	% (MMBtu)	98%	100%	99%
Annual NTG Ratio	% (MMBtu)	54%	74%	65%
Net Annual Savings	kWh	14,085,409	23,072,528	37,157,937
	kW Summer	3,041	4,743	7,784
	kW Winter	1,515	2,757	4,272
	therms	0	0	0
Net Lifecycle Savings	MMBtu	1,345,664	2,204,257	3,549,921
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	0.94	1.66	1.28

Note: The Residential Offering column includes Residential Pilot savings.

15.1. Achievement Against Goals

Figure 146 shows the percentage of CY 2025 gross lifecycle savings goals achieved by each Renewable Rewards offering. The Residential offering's verified and *ex ante* savings slightly exceeded its kWh and kW savings goals. The Business offering's verified and *ex ante* savings were slightly below its kWh and kW savings goals.

Figure 146. CY 2025 Renewable Rewards Program Achievement of Gross Lifecycle Savings Goals



100% *ex ante* gross lifecycle savings reflects the implementer’s contract goals for CY 2025.

Verified gross lifecycle savings contribute to the administrator’s portfolio-level goals.

Note: The Renewable Rewards Program does not generate therm savings. Winter kW goals were not established for CY 2025.

15.2. Impact Evaluation

This section contains the findings for the CY 2025 impact evaluation of the Renewable Rewards Program.

15.2.1. Impact Evaluation Methodology

The evaluation team conducted an impact evaluation of the CY 2025 Renewable Rewards Program using a combination of TRM-defined deemed savings and assumptions, sampled project documentation from SPECTRUM, and information from the tracking database. Table 142 lists specific data collection activities and sample sizes used in the CY 2025 evaluation. Additional details about these activities and their findings can be found in the offering-specific discussions below.

Table 142. CY 2025 Data Collection Activities and Sample Sizes for Impact Evaluation

Activity	Renewable Rewards, Residential	Renewable Rewards, Business
Tracking Database Review	Census	Census
Desk Reviews	58	18

15.2.2. Verified Gross Savings Results for Renewable Rewards Program

Table 143 lists the first-year and lifecycle realization rates for CY 2025, and Table 144 lists verified first-year and lifecycle savings by offering. Overall, the Renewable Rewards Program achieved a first-year evaluated realization rate of 100%, weighted by total (MMBtu) energy savings.

Table 143. CY 2025 Renewable Rewards Program First-Year and Lifecycle Realization Rates

Offering	First-Year Realization Rate					Lifecycle Realization Rate				
	kWh	kW summer	kW winter	therms	MMBtu	kWh	kW summer	kW winter	therms	MMBtu
Residential	98%	99%	110%	N/A	98%	98%	99%	110%	N/A	98%
Residential Pilots	100%	100%	N/A	N/A	100%	100%	100%	N/A	N/A	100%
Business	100%	100%	117%	N/A	100%	100%	100%	117%	N/A	100%
Total	99%	100%	114%	N/A	99%	99%	100%	114%	N/A	99%

Table 144. CY 2025 Renewable Rewards Program First-Year and Lifecycle Verified Gross Energy Savings

Offering	Verified First-Year Savings					Verified Lifecycle Savings				
	kWh	kW summer	kW winter	therms	MMBtu	kWh	kW summer	kW winter	therms	MMBtu
Residential	26,024,468	5,619	2,806	0	88,795	728,685,105	5,619	2,806	0	2,486,274
Residential Pilots	59,622	12	0	0	203	1,669,422	12	0	0	5,696
Business	31,179,092	6,410	3,725	0	106,383	873,014,567	6,410	3,725	0	2,978,726
Total	57,263,182	12,041	6,531	0	195,382	1,603,369,094	12,041	6,531	0	5,470,695

Verified Gross Savings Results

The evaluation team conducted desk reviews of 58 Residential offering projects and 18 Business offering projects to verify *ex ante* savings using project-specific documentation and inputs. Assuming a coefficient of variation of 0.25, a sample size of 58 for the Residential offering population of 2,255, and a sample size of 18 for the population of 250 Business offering provides a 90% confidence interval with a 5% relative precision target. The team randomly sampled 52 of the 58 Residential projects for the desk review, selecting the six largest projects as the census stratum. The team also randomly sampled 16 of the 18 Business projects, selecting the two largest projects as the census stratum. The team then determined the relative precision of the kWh and kW realization rates to estimate the accuracy of extrapolating these results to the rest of the population. Generally, a relative precision of less than $\pm 10\%$ is considered strong. Table 145 shows the relative precisions calculated for the Residential and Business samples. The relative precision results allowed the evaluation team to confidently apply the realization rates determined from the samples to all Residential and Business projects.

Table 145. Renewable Rewards Program Relative Precision

Offering	Relative Precision of kWh Realization Rate	Relative Precision of kW Realization Rate
Residential	0.49%	0.13%
Business	0.00%	0.00%

During desk reviews, the evaluation team verified the equipment type, number of panels, array tilt, and array azimuth in project applications. The DC capacity and orientation system from the application, along with the 2025 TRM’s average AC kWh/kWDC value for the appropriate orientation, determined the estimated AC kWh annual output for the system. For single systems comprising multiple arrays with varying orientations, the team calculated the annual output for each array individually and then aggregated the results to determine the annual output for the entire system.

The team found that one project in the Residential offering calculated savings based on miscategorized azimuth/compass direction for each set of module groups. Specifically, 137 modules facing west at an azimuth of 270 degrees had been categorized as south-facing modules. Similarly, 137 modules facing east at an azimuth of 90 degrees were also categorized as south-facing modules. This discrepancy resulted in lower verified savings than *ex ante* savings, with project realization rates of 80% for kWh and 94% for kW.

Table 146 shows the overall realization rates determined by the desk reviews for the Residential offering, Residential pilots, and Business offering. The evaluation team applied the listed realization rates to *ex ante* gross savings to determine each offering’s verified gross savings.

Table 146. Renewable Rewards Program Realization Rates

Offering	Realization Rate kWh	Realization Rate kW Summer	Realization Rate kW Winter
Residential	98%	99%	110%
Residential Pilots	100%	100%	100%
Business	100%	100%	117%

Table 147 shows the *ex ante* and *ex post* verified gross savings for the Renewable Rewards Program by offering and the program overall.

Table 147. CY 2025 Renewable Rewards Program *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW summer	kW winter	therms	kWh	kW summer	kW winter	therms
Residential Offering								
First-Year Gross Savings	26,539,331	5,649	2,543	0	26,024,468	5,619	2,806	0
Lifecycle Gross Savings	743,235,033	5,649	2,543	0	728,685,105	5,619	2,806	0
Residential Offering, Pilots								
First-Year Gross Savings	59,622	12	0	0	59,622	12	0	0
Lifecycle Gross Savings	1,669,422	12	0	0	1,669,422	12	0	0
Business Offering								
First-Year Gross Savings	31,179,092	6,410	3,171	0	31,179,092	6,410	3,725	0
Lifecycle Gross Savings	873,014,560	6,410	3,171	0	873,014,567	6,410	3,725	0
Total Renewable Rewards								
First-Year Gross Savings	57,778,045	12,071	5,714	0	57,263,182	12,041	6,531	0
Lifecycle Gross Savings	1,617,919,015	12,071	5,714	0	1,603,369,094	12,041	6,531	0

15.2.3. Verified Net Savings Results for Renewable Rewards Program

To calculate net savings for the Renewable Rewards Program, the evaluation team applied NTG results from the CY 2024 participant survey. The survey included questions that allowed the team to calculate freeridership (measures that would have been purchased without the offering’s influence) and spillover (offering-induced energy-saving actions). To calculate final NTG ratios, the evaluation team combined self-report freeridership and spillover using the following equation.

$$NTG = 1 - Freeridership + Participant Spillover$$

Table 148 shows the self-reported freeridership, spillover, and final NTG ratios that the team applied to the Renewable Rewards Program in CY 2025.

Table 148. Renewable Rewards Program Freeridership and Spillover Results by Sector

Offering	Freeridership	Spillover	NTG (1 – Freeridership + Spillover)
Residential	46%	0%	54%
Residential Pilots	0%	0%	100%
Business	26%	0%	74%

Table 149 shows the total lifecycle gross verified savings, lifecycle net savings, and final NTG ratios for the Renewable Rewards offerings and total program in CY 2025. Overall, the Renewable Rewards Program had an NTG ratio of 65%.

Table 149. CY 2025 Renewable Rewards Program First-Year Net Savings and NTG

Offering	Total First-Year Verified Gross Savings (MMBtu)	Total First-Year Net Savings (MMBtu)	NTG Ratio
Renewable Energy, Residential	88,795	47,950	54%
Renewable Energy, Residential Pilots	203	110	54%
Renewable Energy, Business	106,383	78,723	74%
Total	195,382	126,783	65%

15.3. Process Evaluation

This section discusses process evaluation activities conducted in CY 2025 related to the Renewable Rewards Program.

15.3.1. Process Evaluation Methodology

The design and implementation of the Renewable Rewards Program did not change in CY 2025. The evaluation team’s process evaluation focused on understanding the program’s status and assessing participant satisfaction. Table 150 lists the data collection activities and sample sizes for all primary data collection.

Table 150. CY 2025 Renewable Rewards Program Process Evaluation Activities

Activity	CY 2025 Completes (n)
Program Documentation Review	✓

Program Documentation Review

The evaluation team reviewed the Renewable Rewards implementation plan to gain insights into the program's operations during CY 2025. The team also reviewed miscellaneous documentation, like quarterly performance reports to the PSC from the program administrator, to understand program updates and progress in CY 2025.

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15.3.2. Design and Delivery

The Renewable Rewards Program provides incentives to residential customers living in a single-family home, owners of multifamily buildings, and businesses that install a solar PV system. Customers work with trade allies to verify that their system meets program eligibility requirements and to reserve an incentive. Customers then apply to receive their reserved incentive after their solar PV system installation is complete.

Table 151 shows incentives available to single-family, multifamily, and business customers.

Table 151. Renewable Rewards Incentives,

Residential Single-Family Incentive	Residential Multifamily Incentive	Business Incentive
\$300 per system	\$50 per kW, up to \$25,000	\$50 per kW, up to \$25,000

Department of Administration Solar/Heat Pump Pilot

Focus on Energy launched the Solar/Heat Pump Pilot in 2023 to encourage the inclusion of solar PV and heat pumps in income-qualified multifamily housing. The goal of the pilot is to work with weatherization agencies to cover half of the costs of solar PV and heat pumps in small multifamily buildings with existing electric resistance heating. A building must have between four and 12 units and incorporate both solar PV and heat pump space heating to qualify. Buildings must also meet income-qualification requirements and have been previously weatherized or include weatherization in the project scope.

The pilot offers incentives of \$1,500/kW (DC) up to a maximum of \$15,000 and 50% of the cost of heat pump units (up to \$3,000 for air-source heat pumps and up to \$800 for heat pump water heaters). The maximum total incentives are \$75,000 per building and \$225,000 per property.

15.4. Cost-Effectiveness

Evaluators commonly use cost-effectiveness tests to compare the benefits and costs of a DSM offering. The benefit/cost test used in Wisconsin is a modified version of the TRC test. Appendix J. Cost-Effectiveness and Emissions Methodology and analysis in Volume III includes a description of the TRC test. Table 152 lists the CY 2025 incentive costs for the Renewable Rewards Program.

Table 152. CY 2025 Renewable Rewards Incentive Costs

Offering	Incentive Costs
Residential Renewable Rewards	\$1,068,759
Business Renewable Rewards	\$1,718,361
Total	\$2,787,121

The evaluation team found that the CY 2025 Renewable Rewards Program was cost-effective (1.28). Table 153 lists the evaluated costs and benefits.

Table 153. CY 2025 Renewable Rewards Costs and Benefits^a

Cost and Benefit Category	Total
Costs	
Administration Costs	\$129,313
Delivery Costs	\$1,710,665
Incremental Measure Costs	\$82,337,621
Total Non-Incentive Costs	\$84,177,599
Benefits	
Electric Benefits (kWh)	\$18,334,786
Electric Benefits (kW)	\$32,218,967
T&D Benefits (kW)	\$9,210,180
Gas Benefits	\$0
Emissions Benefits	\$47,997,348
Total TRC Benefits	\$107,761,281
Net TRC Benefits	\$23,583,682
TRC Benefit/Cost Ratio	1.28

^a The DOA Solar/Heat Pump Pilot spans the Multifamily and Renewable Rewards Programs. Verified savings are allocated to each program based on the type of equipment installed. For the cost-effectiveness analysis, \$35,000 in DOA pilot solar PV incentives are allocated to Residential Renewables; the remainder of pilot costs are allocated to the Multifamily Program.

15.5. Outcomes and Recommendations

The evaluation team offers the following outcomes and recommendations based on the CY 2025 evaluation.

Outcome 1. Program realization rates are strong, despite small differences in savings found in the residential offering. For one residential project, *ex ante* miscategorized the azimuth/compass direction for 274 modules and subsequently applied the TRM-deemed savings associated with the incorrect direction. This resulted in low kW and lifecycle savings realization rates.

Recommendation 1. To ensure accuracy in savings estimates, review project photos and relevant documentation thoroughly when approving projects, paying close attention to module compass direction.

16. Pilot Programs

Focus on Energy regularly offers pilot programs to test new program theories or delivery mechanisms. The pilots might test the effectiveness of a new program design by delivering familiar measures to a new audience or through a new channel, or test the feasibility of a new type of measure or program design.

Table 154 lists all Focus on Energy pilot program activities in CY 2025. The PSC, program administrator, and evaluation team previously agreed to conduct evaluations of pilot programs at the end of each pilot; however, the program administrator may request a mid-pilot evaluation as needed. In CY 2025, the evaluation team conducted evaluation activities for the Accessible Efficiency, Community Impact, and Life Sciences Midstream pilots. Summaries of pilot evaluation activities are presented in this chapter.

Table 154. Focus on Energy CY 2025 Pilot Program Activity

Pilot	Description	CY 2025 Pilot Activity
Accessible Efficiency	This pilot provides income-qualified seniors and individuals with disabilities with smart home and energy-saving devices designed to improve accessibility, independence, and energy management. Measures may include smart thermostats, voice-activated devices, lighting controls, and other home upgrades installed at no cost to participants. The program works with community-based organizations (CBOs) to identify eligible participants and support referrals.	Focus on Energy launched the pilot in June CY 2025 and implemented it in the Milwaukee area. The pilot completed 189 projects before closing in December 2025.
Community Impact	The Community Impact Pilot encourages energy upgrades that provide meaningful impact to small businesses in targeted communities. Qualified businesses in participating communities are eligible for up to \$30,000 in energy efficiency upgrades.	Focus on Energy launched this pilot in CY 2024. At the conclusion of CY 2025, 107 businesses had completed the pilot (51 in CY 2024 and 56 in CY 2025) across 13 Wisconsin communities. Focus on Energy plans to continue this pilot through CY 2026.
Life Sciences Midstream	This pilot offers midstream incentives for energy-efficient ultra-low-temperature freezers and lab-grade refrigerators, such as those used in bioscience and medical facilities.	Focus on Energy launched this pilot in CY 2024. At the conclusion of CY 2025, the total number of participants having completed the pilot is 51 (25 in CY 2024 and 26 in CY 2025). A total of 754 units have been installed as part of the pilot within 444 measures. In 2026, Focus on Energy transitioned this pilot into an offering under the Instant Discounts Program.

Pilot	Description	CY 2025 Pilot Activity
Income Qualified Direct Install	This program provides income-qualified customers with the opportunity to purchase a smart thermostat from the existing Online Marketplace and to schedule installation services for the new thermostat at the point of purchase.	Focus on Energy launched this pilot in CY 2025. At the conclusion of CY 2025, 103 participants had installed 131 thermostats through the program.
Department of Administration Solar/Heat Pump Pilot	This pilot works with weatherization agencies to offset a portion of the costs for solar PV and heat pumps in small multifamily buildings that currently rely on electric resistance heat. Eligible buildings must have four to 12 units, include both solar PV and heat pump space heating, meet income qualification requirements, and either have already been weatherized or include weatherization within the project scope.	Focus on Energy launched this pilot in CY 2023 and plans to sunset the pilot in CY 2026. In CY 2025, one participant completed a single pilot project consisting of a solar PV and heat pump installation.
Integrated Network Lighting Controls	This pilot evaluates the energy savings potential of networked lighting controls and integrated lighting systems in commercial buildings.	The pilot fully integrated two projects in CY 2024. Slipstream conducted post-integration data monitoring and analysis in CY 2025.
Home Energy Upgrade Pilot	This community-focused pilot provides whole-home retrofits at no cost to single-family and multifamily customers. It targets residential customers in selected communities with high energy burdens and offers comprehensive energy efficiency and safety upgrades. The pilot aims to build partnerships with advocates, CBOs, and local contractors to serve qualified customers.	The pilot launched Phase I in Q3 2024 and will continue until August 2026. At the end of CY 2025, contractors conducted 40 assessments through the pilot and completed project upgrades to 40 units
Focus Force Milwaukee	Focus on Energy launched this pilot to recruit, educate, and train individuals from disadvantaged communities for careers in energy efficiency. The pilot offers participants the opportunity to engage in technical training and career development.	The pilot launched in CY 2023 and is currently in progress; it is scheduled to conclude in December 2026.
Empowering Faith Communities for Energy Efficiency	Focus on Energy aims to expand its customer base by partnering with places of worship through this pilot. The initiative involves conducting energy assessments at 20 places of worship per year and 10 assessments for partnering CBOs each year. During this process, the implementation team hosts workshops for congregations to educate them on energy efficiency improvements.	The pilot launched in Q4 2025. Within CY 2025, seven projects were completed under the pilot. The pilot will conclude at the end of CY 2026, at which point it will be evaluated and reported on.

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16.1. Accessible Efficiency Pilot

The Accessible Efficiency Pilot is a Focus on Energy initiative designed to expand access to energy efficiency programs for customers facing both energy and accessibility barriers. The pilot engages individuals who have been historically underserved by traditional offerings—particularly older adults, people with disabilities, and individuals who require assistance operating home equipment—by providing targeted direct-install measures that support energy savings, comfort, and personal independence.

The pilot aims to reduce financial, informational, and logistical barriers that limit participation among low- to moderate-income households, renters, and customers with functional limitations. It delivers a suite of direct-install energy efficiency and accessibility measures at no cost to participants. Many measures offer alternative ways to control household systems via remote access, automation, smart scheduling, or voice activation, making daily activities easier and safer for participants with mobility or dexterity challenges.

The available measures include the following:

- Nest Smart Speaker (Nest Audio)
- Smart Thermostat
- Pipe Insulation (9 feet)
- Air Purifier
- Advanced Smart Strip
- Handheld Showerhead
- Smart Connected LED (BR30, Candelabra)
- Smart Connected LED (A19)
- 9W Standard LED
- Kitchen Faucet Aerator
- Bathroom Faucet Aerator
- Nest Hub

A central component of the pilot is its partnership model. The pilot was implemented by SEEL Inc. in CY 2025, collaborating with two CBOs with deep experience serving accessibility-focused communities and a trade ally responsible for in-home installations. CBOs help identify eligible participants, build trust, and support a streamlined enrollment process. CBOs leverage their existing networks, daily interactions with clients, and mission-driven outreach efforts to promote the pilot, refer participants, and facilitate successful participation. Before making referrals, each CBO completes an onboarding process that covers eligibility criteria, program expectations, and referral procedures.

In CY 2025, the pilot partnered with a single trade ally who managed all in-home installations, including scheduling visits, completing on-site assessments, installing eligible measures, and configuring smart home devices. During each visit, the installer used the program's standardized assessment form to document key home characteristics—such as home type, square footage, heating and cooling systems, and foundation type—as well as the make and model of existing equipment when available. This assessment ensured that selected measures were compatible with the participant's home and needs, while

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also providing valuable data on a customer segment for which Focus on Energy previously had limited information. After completing the assessment, the trade ally proposed and installed the appropriate mix of measures, connected the devices to the participant’s Wi-Fi network, and provided hands-on education to ensure the participant could operate the technology confidently. A SEEL Program Specialist visited the customer’s home within a month of the installation to perform quality assurance and control on the equipment.

16.1.1. Impact Evaluation

This section presents the evaluation team’s CY 2025 impact evaluation methodology and results for the Accessible Efficiency Pilot. The evaluation team separated pilot projects and associated savings from other residential programs. Therefore, the pilot savings presented in this chapter are in addition to those reported in the residential program chapters.

Table 155 summarizes the performance and savings impacts of the Accessible Efficiency Pilot in CY 2025.

Table 155. CY 2025 Accessible Efficiency Pilot Summary

Item	Units	CY 2025
Incentive Spending	\$	\$201,755
Participation	Number of Participants	189
Verified Gross Lifecycle Savings	kWh	818,205
	kW Summer Peak	13
	kW Winter Peak	13
	therms	45,005
Verified Gross Lifecycle Realization Rate	% (MMBtu)	89%
Annual NTG Ratio	% (MMBtu)	100%
Net Annual Savings	kWh	73,944
	kW Summer Peak	13
	kW Winter Peak	13
	therms	4,432
Net Lifecycle Savings	MMBtu	7,292
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	0.49

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Impact Evaluation Methodology

The evaluation team designed its CY 2025 impact evaluation to integrate multiple perspectives in assessing the pilot. Table 156 lists the impact evaluation activities conducted in CY 2025 and the number of completes achieved, if relevant. Additional details about these activities and the associated findings can be found in the sections below. To calculate gross verified savings, the evaluation team relied on the 2026 TRM and participant survey results. The team based the savings for nine of the measures on work papers that were still in development when the Wisconsin 2025 TRM was published. The smart display, smart speaker, and standard LED screw-in lamp measures for this pilot had no associated savings.

Table 156. CY 2025 Accessible Efficiency Impact Evaluation Activities and Number of Completes

Activity	CY 2025 Completes (n)
Tracking Database Review	Census
Participant Survey	53

Tracking Database Review

The evaluation team reviewed the census of records in Focus on Energy’s database, SPECTRUM. This involved thoroughly reviewing the data to ensure SPECTRUM totals matched the administrator’s reported totals and to check that complete and consistent information was applied across data fields (e.g., measure names, first-year savings applications, EUL).

Participant Survey

The team conducted an online survey of Accessible Efficiency Pilot participants who received smart devices or other energy efficiency measures in CY 2025. Survey details can be found in the *Process Evaluation* section below. Participants’ survey responses provided in-service rates that the evaluation team applied to measure-level verified savings.

Verified Gross Savings Results for the Accessible Efficiency Pilot

Table 157 lists the first-year and lifecycle realization rates for the Accessible Efficiency Pilot in CY 2025, and Table 158 lists verified first-year and lifecycle savings. Overall, the pilot achieved a first-year evaluated realization rate of 84%, weighted by total (MMBtu) energy savings. Detailed findings, including factors affecting the realization rates, are discussed below.

Table 157. CY 2025 Accessible Efficiency Pilot First-Year and Lifecycle Realization Rates

First-Year Realization Rate					Lifecycle Realization Rate		
kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
70%	133%	84%	95%	84%	81%	96%	89%

Table 158. CY 2025 Accessible Efficiency Pilot First-Year and Total Lifecycle Verified Gross Savings

Verified First-Year Savings					Verified Lifecycle Gross Savings		
kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
73,944	13	13	4,432	696	818,205	45,005	7,292

The evaluation team relied on the 2026 TRM and results of the CY 2025 Accessible Efficiency Pilot participant survey to assess savings from measures installed through the pilot in CY 2025. Table 159 shows the *ex ante* and verified savings for the pilot. In-service rates and factors affecting specific measure realization rates are described below.

Table 159. CY 2025 Accessible Efficiency Pilot *Ex Ante* and Verified Gross Savings

	<i>Ex Ante</i> Gross				Verified Gross			
	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
First-Year Gross Savings	105,513	10	15	4,647	73,944	13	13	4,432
Lifecycle Gross Savings	1,011,378	10	15	47,070	818,205	13	13	45,005

In-Service Rates

To account for how pilot participants used the measures, the evaluation team applied in-service rates (ISRs) to gross savings. The team applied ISRs from the CY 2025 participant survey for all measures.

Table 160 shows the *ex ante* and verified lifetime ISRs used in the CY 2025 impact evaluation, along with the sources for the verified ISRs. The advanced power strip has the largest discrepancy between the *ex ante* and verified ISRs (90% *ex ante* versus 20% verified). Survey results indicated that while most participants were using the advanced power strip, most respondents reported that they were using it like a normal power strip rather than to automatically turn equipment on and off to save energy. The smart display, smart speaker, and LED screw-in lamp measures did not have associated savings; therefore, they did not have *ex ante* ISRs. However, the team calculated ISRs for these measures for informational purposes.

Table 160. CY 2025 Accessible Efficiency Pilot ISRs by Measure

Measure Name	Ex Ante ISR	Verified ISR	Verified ISR Source
A19 Omnidirectional, Hub, Wi-Fi Connected Bulb	84%	100%	2025 Participant Survey
Advanced Power Strip, APS Tier 2, Direct Install	90%	20%	2025 Participant Survey
E12 Candelabra, Hub, Wi-Fi Connected Bulb, Direct Install	84%	100%	2025 Participant Survey
Faucet Aerator, Bath, 1.0 GPM, Direct Install	100%	100%	2025 Participant Survey
Faucet Aerator, Kitchen, 1.5 GPM, Direct Install	100%	91%	2025 Participant Survey
Insulation, DHW Pipe, Direct Install	100%	100%	2025 Participant Survey
LED, Direct Install, 9 Watt, Standard	N/A ^a	100%	2025 Participant Survey
Room Air Cleaner, Smoke CADR < 150M	100% ^b	100%	2025 Participant Survey
Showerhead, Handheld, 1.5 GPM, Direct Install	100%	91%	2025 Participant Survey
Smart Display	N/A ^a	93%	2025 Participant Survey
Smart Speaker	N/A ^a	96%	2025 Participant Survey
Smart Thermostat, Gas and Electric	N/A ^b	100%	TRM Deemed savings accounts for ISR impact

^a Measure does not have any associated savings and therefore no *ex ante* ISR. Verified ISRs are for informational purposes only.

^b Measure is included in 2025 TRM, but with no ISR listed because ISR is baked into the deemed savings. Verified ISR is thus assumed to be 100%.

Aeration and Showerhead Measures

Ex ante savings for faucet aerators and showerheads applied single-family and multifamily deemed savings from the 2026 TRM. However, multifamily savings were mistakenly applied to some of the single-family MMIDs. Incorrect savings and lower verified ISRs caused realization rates to deviate from 100%. Table 161 lists first-year measure-level realization rates for these measures.

Table 161. CY 2025 Aeration and Showerhead First-Year Realization Rates

Measure Name, MMID	First-Year Realization Rate				
	kWh	kW Summer	kW Winter	therms	MMBtu
Faucet Aerator, Kitchen, 1.5 GPM, Direct Install, 10355	102%	97%	97%	98%	99%
Faucet Aerator, Bath, 1.0 GPM, Direct Install, 10354	104%	106%	106%	99%	100%
Showerhead, Handheld, 1.5 GPM, Direct Install, 10352	95%	98%	98%	89%	90%

16.1.2. Process Evaluation

The process evaluation examined the implementation and customer experience with the Accessible Efficiency Pilot in CY 2025. The analysis focused on five primary objectives:

- Evaluating pilot design, partner, and participant satisfaction
- Examining impacts on independence and comfort
- Verifying installation and continued use of measures
- Gauging awareness of Focus on Energy and energy efficiency
- Identifying changes in energy use behaviors following installation

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To address these objectives, the evaluation team collected data from a variety of sources. Research activities are summarized in Table 162 and further described below. Together, these sources provided complementary perspectives on pilot operations, participant experiences, and early outcomes.

Table 162. CY 2025 Data Collection Activities and Responses – Process Evaluation

Activity	Completes
Staff Interviews	1
Community-Based Organization Interviews	2
Trade Ally Interview	1
Participant Survey	53

Staff Interviews

The evaluation team interviewed program staff to assess the status of the pilot in CY 2025. These discussions provided context on program implementation, eligible participants, referral pathways, and anticipated outcomes. The interview also informed the team’s understanding of program design considerations and early lessons learned.

Community-Based Organization Interviews

The evaluation team conducted two 60-minute virtual interviews in November and December 2025 with representatives from the two partner CBOs. Discussions focused on the referral process, customer engagement, participant experiences, challenges, and overall satisfaction with the pilot.

Trade Ally Interview

The team conducted a 45-minute virtual interview in November 2025 with the trade ally responsible for conducting home visits and installing measures in CY 2025. Topics included the installation process, operational procedures, participant interactions with installers, challenges, satisfaction, and overall impressions of the pilot’s effectiveness.

Participant Survey

The team conducted an online survey of Accessible Efficiency Pilot participants who received smart devices or other energy efficiency measures in CY 2025. The sample frame included 162 participants with available contact information (email or phone). Of these, 53 respondents completed the survey, yielding a 33% response rate.

Survey responses provided insight into participants’ satisfaction with their experience, changes in comfort and independence, awareness of Focus on Energy offerings, self-reported changes in energy use and bills, and energy-efficient actions motivated by their participation.

The findings that follow integrate insights across these data sources and are presented by research objective.

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Pilot Design Assessment and Satisfaction Insights

Strengths of Pilot Design

Findings from partner interviews provide insight into how the pilot operated in practice and how its design translated into field implementation.

Community-Based Organization Interviews

The two CBO interviewees who partnered were asked to reflect on what worked well in the pilot's design and referral process. Both CBOs identified the opt-in, no-cost structure as a core strength. One described the pilot as "very clear on what was available and very easy to navigate," explaining that participation came down to a simple yes or no decision with no financial obligation for the participant. The other CBO echoed this sentiment, describing the referral criteria as "simplistic" and the application as easy to complete. Documentation requirements were minimal, and neither organization reported that submitting referrals created meaningful additional work for staff.

One CBO highlighted the implementer's physical demonstration board as an effective outreach tool, explaining that, rather than relying solely on printed descriptions, staff could show participants how the devices worked. The same CBO noted that the pilot team produced Spanish-language materials in response to their feedback. This CBO also used a wide range of outreach channels: newsletters, social media, a walk-in resource center, an Americans with Disabilities Act celebration event, a personal care worker event, monthly food distribution events, and agency open houses. They also included materials in client intake folders to reach individuals already connected to the organization for other services. The other CBO said they integrated pilot outreach into an existing monthly community series attended by approximately 50 to 60 seniors. Focus on Energy representatives participated as guest speakers, allowing attendees to see the products, ask questions, and complete applications during the event.

Trade Ally Interview

The one partnering trade ally reported the pilot's strengths as clarity and the autonomy it afforded installers in the field. They also noted the per-measure payment structure was straightforward, and that they worked primarily with a single implementer contact who could resolve questions quickly, describing the contact as "very available and open to our questions."

"The simplicity of the program eliminated [administrative] potential barriers. We didn't have to go up 17 levels to get approval. It just didn't seem necessary in this pilot."

-Accessible Efficiency Trade Ally

The trade ally described installations as end-to-end home visits—the installers arrived fully equipped with the necessary devices, completed setup and connectivity, walked customers through each measure, and left written materials behind. The trade ally was also available for follow-up troubleshooting over the phone or in-person. They estimated that follow-up visits were needed for roughly 5% of customers; these visits were driven less by installation failures and more by customers who preferred in-person support. The trade ally said the mix of measures was well suited to the population served, including smart lighting, voice-activated controls, thermostats, air purifiers, and handheld showerheads, each addressed specific aspects of independence and daily comfort for older adults and people with disabilities.

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“I know one woman that we spoke with was asking for extra referral forms so she could get them to the other people in her apartment building.”

- Accessible Efficiency Trade Ally

The trade ally noted that as installations progressed, word-of-mouth referrals increased, explaining that some participants asked installers for additional referral forms to share with neighbors. Participants also contacted the trade ally directly to express appreciation, describing how specific measures had changed aspects of their daily routines. The trade ally noted this type of feedback is

uncommon in the energy efficiency field, where outcomes are typically measured in kilowatt hours rather than personal experience.

Partner Challenges and Opportunities

Partner interviews identified operational challenges and opportunities to inform future pilot or program design.

Community-Based Organization Interviews

While both CBOs reported a generally smooth referral process, each identified challenges. Both respondents noted the renter-homeowner distinction as a structural barrier. For example, participants who rented their homes perceived that landlord permission was required before devices, namely the smart thermostat, could be installed, which prevented some otherwise eligible individuals from enrolling. One CBO identified the perceived requirement for landlord approval as a primary reason interested participants did not complete the process.

“Maybe when you read [the flyer that lists potential measures], you see the one thing that you don't want so you don't take any of it.”

-Accessible Efficiency CBO

One CBO flagged a messaging issue with how the product offerings were presented, noting some people appeared to believe they were required to accept all available devices rather than selecting individual measures. Though it was not frequent, the CBO thought it may have discouraged participation in some cases.

Questions about hidden costs and legitimacy were frequently raised, according to the CBOs. They noted that staff needed to reassure individuals about the pilot before they would engage. One CBO said that framing the benefit as technology rather than financial assistance helped; it did not carry the same associations for participants as more traditional assistance programs.

One CBO described a slower start in the first quarter, attributing this to the time needed to establish outreach channels and broaden its referral network. As those efforts gained traction, enrollment accelerated, and the organization met its benchmarks approximately three months before the pilot concluded. The same CBO identified the frequency of coordination meetings as an area for potential streamlining, noting weekly meetings involving multiple staff members with competing responsibilities often produced no substantive updates. This CBO suggested periodic email check-ins supplemented by less frequent standing meetings as a more efficient alternative.

The second CBO reported no capacity constraints but noted one point of feedback. “Two to three” participants reported not being offered the same devices or upgrades as others in their social network,

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creating a perception of “being left out.” The CBO suggested that clearer communication at installation regarding why certain items were or were not included could help manage expectations.

Trade Ally Interview

The trade ally interview also identified challenges encountered during the pilot and opportunities for refinement. One operational challenge the trade ally reported was referral volume, particularly during the opening weeks of the pilot. They noted that CBOs were the primary referral sources, but the pipeline initially moved slowly enough that installers had downtime in early June and July.

“If we were able to hit the ground running in May... we probably could have achieved another 20, 30 projects.”

-Accessible Efficiency Trade Ally

The trade ally cited technology and connectivity issues as a recurring challenge throughout the pilot. For example, certain smart devices required a 5 GHz Wi-Fi connection, while many households operated primarily on 2.4 GHz networks. When installers encountered a mismatch during an installation, participants often needed to contact their internet service provider to adjust router settings. This either extended the

installation appointment or required a return visit to complete device setup.

The trade ally reported that smart thermostats were the measure most likely to require additional follow-up support. They explained that the issue rarely stemmed from equipment malfunction; instead, customers often struggled with unfamiliar technology. Navigating an unfamiliar mobile application, understanding scheduling functions, or finding the right screen within the interface were real barriers for older customers. As previously mentioned, phone-based troubleshooting helped in some cases, but the trade ally was clear that in-person support was consistently more effective for this population.

“There were some technology hurdles — participants knew what they wanted to do on their phone, but finding the app... not deleting the app randomly because they were watching TV and decided they didn’t want it anymore.”

-Accessible Efficiency Trade Ally

Some participants were uncertain about the purpose of the trade ally's home assessment process. The trade ally said that because installers conducted a broader evaluation of the home during each visit — asking about heating, cooling, and other systems — some participants were unsure why questions were being asked about equipment outside the scope of what they expected to receive. The trade ally mentioned that this raised concerns among a few participants that something might be wrong with their home.

Procurement presented another challenge. The trade ally preferred to source products from regional, diverse suppliers, but supply issues—particularly for air purifiers—sometimes required sourcing from large national retailers instead.

Finally, the pilot's short duration created workforce continuity challenges for the trade ally. Because of the limited timeline, it was staffed largely with workers who could fill the role without long-term employment

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expectations. Several installers remained with the company through September, but when the pilot concluded, there was no ongoing work available to retain them. The trade ally noted that this concern was not specific to this pilot but rather reflects a broader limitation of short-term pilot programs, which often lack the continuity of work needed to sustain workforce development.

Motivations for Participation

Interviews with pilot partners and survey responses from participants provide insight into the motivations of organizations and households to participate in the pilot.

Community-Based Organization Interviews

“Accessibility was the big thing. Looking at the priorities that [Focus on Energy] had, the community or the populations that they wanted to reach, knowing that that was our community and really looking at it from an accessibility standpoint.”

-Accessible Efficiency CBO

CBOs were asked what motivated them to participate in the pilot’s referral process. Both organizations pointed first to alignment between the target population and their existing client base. Each already serves seniors and people with disabilities, and both viewed the pilot as consistent with their broader missions. The ability to offer participants free, tangible equipment was a clear motivating factor.

One CBO described its participation in terms of several overlapping service priorities. The pilot addressed assistive technology, physical accessibility, and clients’ economic

circumstances simultaneously. They specifically noted that voice-activated devices could help individuals with mobility limitations interact more easily in their homes. The energy efficiency dimension was also relevant given that many of their clients live on fixed or limited incomes. The pilot, as this CBO put it, “ticked a lot of those boxes.”

The second CBO approached the pilot from a role as a community health educator, viewing it as another way to introduce seniors to resources they might not otherwise encounter. For many participants, the pilot served as an introduction to smart home technologies they would likely not have adopted on their own. Because the organization already hosts a regular community series attended by local seniors, incorporating the pilot into existing activities was relatively straightforward. As this CBO explained, “having a volume of seniors that come through, it’s another way of educating them on the different programs that [are available] in the city.”

Trade Ally Interview

The trade ally described their involvement in the pilot as both intentional and opportunistic. The company had already begun exploring accessibility-oriented services, and the pilot provided a practical opportunity to expand into that space. From a business perspective, the pilot offered a way to develop a new service area while generating revenue from a population the company had not previously served.

They also described a sense of purpose in the work itself, noting that providing technology to improve

“This felt like a super underserved group of customers that could benefit from dollars they’ve been paying in over the years. It felt like a really good, targeted way to reach those customers.”

-Accessible Efficiency Trade Ally

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daily independence for older adults and people with disabilities gave it a dimension that standard efficiency work typically does not.

Participant Survey

Participant survey results provide insight into why individuals enrolled in the pilot. The most commonly selected reason for participation was to better control heating, cooling, or lighting in the home (51%) (Figure 147), followed by a desire to increase independence (36%), and wanting to use energy more wisely or try a new technology (each 30%). "Other" responses included hearing about the pilot from a friend who had a positive experience, health benefits from installed products, and wanting specific products.

Figure 147. Motivations for Participation



Source: Accessible Efficiency Participant Survey. "Thinking back to when you first heard about the program, why did you want to participate? Select up to three." (n=53). Multiple responses were allowed. Percentages exceed 100%.

Partner and Participant Satisfaction

Satisfaction findings reflect perspectives from community partners, the trade ally, and participating households.

Community-Based Organization Interviews

As part of the interview, CBOs were asked to rate their satisfaction with the pilot across several categories on a five-point scale ranging from *not at all satisfied* to *very satisfied*. Ratings were consistently high across almost all categories (Table 163).

Table 163. Community-Based Organization Satisfaction

Rating	Satisfaction Category
Very satisfied (5)	Overall satisfaction
	Training provided by Focus on Energy
	Marketing materials provided by Focus on Energy
	Clarity of referral criteria
	Ease of referral submission
	Understanding of incentive milestones
	Frequency of communication
	Feedback on referral outcomes
Somewhat satisfied (4)	Usefulness of communication channels (1 CBO)

Training provided by Focus on Energy received a satisfaction rating of 5 from both CBOs. One CBO’s staff had existing familiarity with the assistive technology, so training focused primarily on the process rather than the devices themselves. The other CBO received training through a lunch-and-learn, where implementer staff demonstrated products and answered questions from attendees in real time, giving their team the background needed to discuss the program with clients.

Marketing materials, ease of referral submission, understanding of the incentive milestones, and frequency of communication all received a 5 from both CBOs, with both noting no issues. Feedback on referral outcomes also received a 5 from both CBOs. One CBO reported that the large majority of participants expressed satisfaction with the trade ally, specifically citing how professionally the installer conducted appointments and took time to familiarize participants with their new devices. The other CBO described widespread positive responses.

"[One benefit was] the fact that it was opt-in and there was no financial burden... This program was very clear on what was available and was very easy to navigate. The buy-in was, would you like this? Yes/no, that type of thing. And then there wasn't a lot of extra steps."

-Accessible Efficiency CBO

The only category not to receive a 5 by one CBO was the usefulness of communication channels. As described in the *Partner Challenges and Opportunities* section, this CBO felt some in-person meetings were unnecessary.

Trade Ally Interview

The trade ally was also asked to rate their satisfaction across 11 categories of the Accessible Efficiency Pilot. Ratings were provided on a five-point scale ranging from *very satisfied* to *very dissatisfied*. As shown in Table 164The trade ally reported being *very satisfied* across nine of 11 categories.

Table 164. Trade Ally Satisfaction

Rating	Satisfaction Category
Very satisfied (5)	Program experience overall
	Communication with Focus on Energy
	Support and resources from Focus on Energy
	Training provided by Focus on Energy
	Incentive amount
	Project documentation required
	Data submittal processes
	Customer satisfaction
Somewhat satisfied (4)	Types of devices and home upgrades eligible for the incentive
	Incentive payment timeliness
Neither satisfied nor dissatisfied (3)	Increased business

The trade ally rated their overall experience a 5, describing the partnership with the implementer and CBOs as generally smooth and Focus on Energy’s responsiveness to field feedback as a strength. They rated communication with Focus on Energy as a 5, specifically noting that field issues requiring support from Focus on Energy were resolved quickly, and also rated support and resources and training provided by Focus on Energy as a 5, noting that they did not need much to begin with.

“Many times, in programs like this, you kind of take the good with the bad — there’s some measures that you’re not getting a lot of profit out of, but then there’s others where you can balance that out because the savings are greater.”

-Accessible Efficiency Trade Ally

The trade ally also rated the incentive amount a 5, acknowledging that not every measure carried an equal margin but described the overall structure as one that balanced out across the product mix. They also gave project documentation and the data submittal process a 5, noting that administrative requirements were minimal and the workflow of emailing completed documentation to a single contact added no complication to operations.

“I don’t know what other energy efficiency measures you could put in that would have had the same impact as the ones we already did.”

-Accessible Efficiency Trade Ally

The trade ally rated customer satisfaction a 5 due to the volume of positive feedback, referral activity, and direct expressions of gratitude received throughout the pilot. The eligible devices and home upgrades rounded out the top-rated categories, with the interviewee expressing confidence that the measure mix was as well suited to the target population as it could be.

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The trade ally rated two categories below a 5. The trade ally rated incentive payment timeliness a 4, noting that payments were slow in the early weeks but improved significantly from mid-summer onward. Increased business received a 3, for reasons discussed in the *Partner Challenges and Opportunities* section. According to the trade ally, the pilot was profitable and provided valuable field experience, but its short duration limited workforce continuity.

Participant Survey

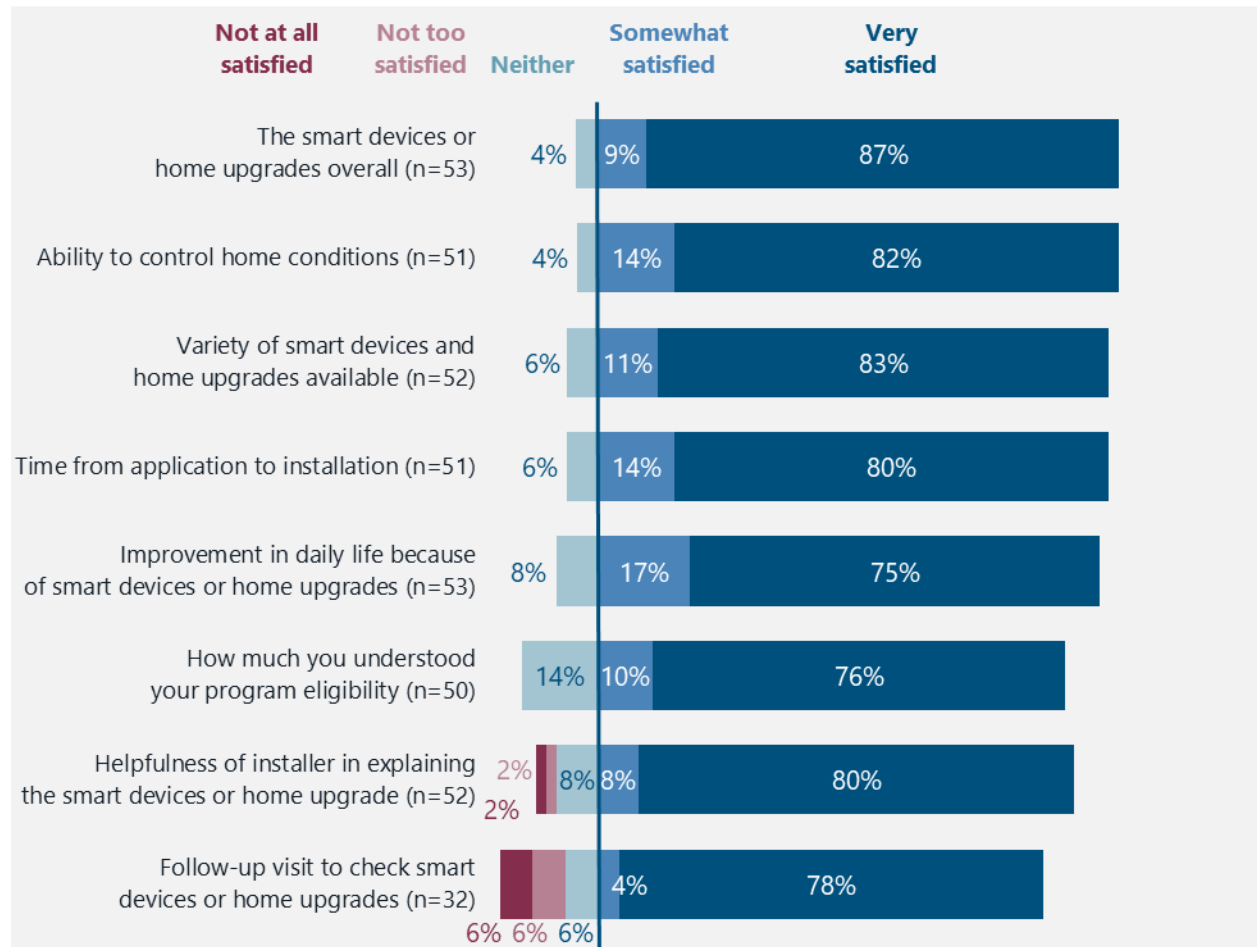
Participant satisfaction was high across nearly all measured areas. The strongest ratings were with devices or home upgrades (87% *very satisfied*), variety of devices available (83%), and ability to control home conditions (82%). Nine respondents provided comments at the end of the survey about their overall positive satisfaction, with one stating, "I appreciate everything about this. I would love for Focus on Energy to know that this made my life better."

One respondent (2%) reported being *not at all satisfied* with installer helpfulness, and another 2% reported being *not too satisfied*. At the end of the survey, six respondents provided positive comments about their experience with the trade ally, noting professionalism and responsiveness. In contrast, four respondents described gaps in service, "The guy that came out to install the stuff was not very helpful... some stuff on the touch screen I had to do myself," and installation concerns, "The technicians/installers need to be better. I like the products, but those smart devices—he changed my password, and I could not use [them]."

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Follow-up visits showed slightly more variation: two respondents (6%) were *not at all satisfied*, and two (6%) were *not too satisfied*. Respondents were given the opportunity to provide additional comments at the end of the survey, and six respondents mentioned the follow-up visit. Five respondents said they did not receive a follow-up visit, while one found the visit to be inadequate and did not resolve their questions.

Figure 148. Participant Satisfaction



Source: Accessible Efficiency Participant Survey. "For each item, choose a number between 1 and 5 that shows how satisfied you are with parts of the program." (n=32-53)

As shown in Figure 149, 98% of respondents reported that, *yes*, they would recommend this program to others with similar accessibility needs. The one respondent who selected maybe (2%) did not provide an additional explanation for their response.

Figure 149. Willingness to Recommend Pilot



Source: Accessible Efficiency Participant Survey. "Would you recommend this kind of program to others who have similar accessibility needs?" (n=53)

Independence and Comfort Outcomes

Partner interviews and participant survey responses examined which installed measures had the greatest impact on independence, comfort, and accessibility, and where participants and partners identified gaps in the product offering.

CBOs Interviews

Smart lighting emerged as the most impactful upgrade in both CBO interviews. CBO representatives described it as the most practically useful device in daily life, with one stating that "if you're getting up in the middle of the night... or anytime you're going into a room, from a practical standpoint, it was probably the most impactful." One interviewee emphasized its safety benefits, stating, "I would actually posit that it's a safety issue."

Interviewees also highlighted smart thermostats as a high-value upgrade, particularly for participants with difficulty using manual controls. One CBO underscored their importance for those who manage medications that require stable temperature regulation, while another described the thermostat as a major contributor to independence and comfort.

"It's amazing how much a basic upgrade can improve your life."

-Accessible Efficiency CBO

Both organizations reported a pre-existing barrier that limited some participants' willingness to engage in the pilot. Some clients expressed concern about the privacy implications of connected devices, particularly thermostats wired into the home, which discouraged participation.

CBO representatives also identified additional products they thought could expand accessibility benefits beyond the current pilot offerings. One mentioned thermal control and anti-scald devices, external lighting for porches and garages, and lever-style faucet handles, noting that lever handles are easier to operate for individuals who have difficulty gripping or twisting. The other focused on non-energy-saving shower safety equipment, such as chairs and benches, explaining that insurance often does not cover these items, and older adults frequently pay out of pocket.

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Trade Ally Interview

The trade ally gathered customer feedback informally through follow-up calls, conversations during revisits, and direct comments provided to installers. They clarified that this feedback occurred only within the short period immediately following installation. The trade ally also noted that they could not speak to energy savings because they did not track energy-use outcomes; instead, they focused on experiential feedback shared directly by customers.

“When they’re entering a room that’s dark, before they even get to the room or get to the light switch, they can turn those lights on and off with their voice. I think that helps reduce the potential for falls.”

-Accessible Efficiency Trade Ally

The trade ally identified smart lighting and the smart hub as the measures with the greatest impact on independence. These devices, they explained, addressed real safety concerns for customers with mobility limitations, particularly those who

struggled to navigate stairs or reach light switches safely in the dark. They also described the handheld showerhead as one of the most meaningful accessibility upgrades, especially for older customers and those with physical limitations.

The trade ally noted that customers valued smart thermostats for their remote control and scheduling capabilities once they learned how to use them. They also received feedback from many customers with respiratory conditions, who reported that the air purifier made a noticeable difference. In addition, the trade ally identified several measures that customers expressed interest in, including water heater blankets and non-energy-saving products, such as handrails and security cameras.

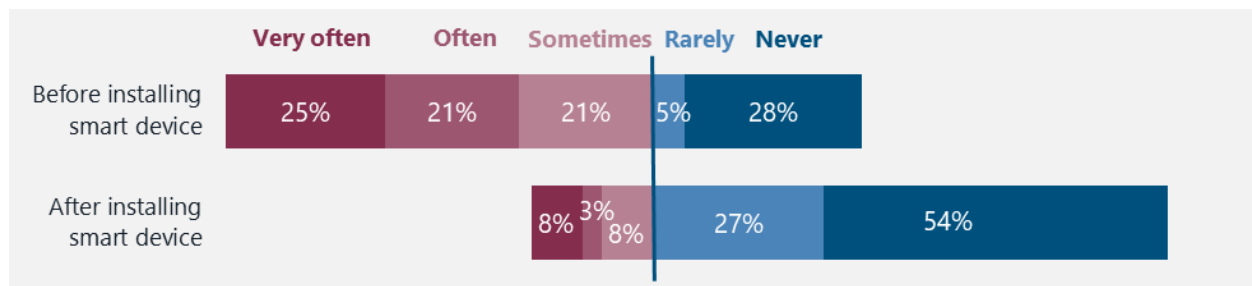
“A lot of people, when we had the thermostat working well, really appreciated being able to set the temperatures from their phone — to be able to set it before they got home and not have to constantly run their furnace or their air conditioning.”

-Accessible Efficiency Trade Ally

Participant Survey

Survey responses captured how frequently respondents felt frustrated when adjusting lighting in their homes before and after smart device installation. Before installation, around two-thirds of respondents felt frustrated between *sometimes*, *often*, or *very often* (Figure 150). After installation, only 19% of respondents selected these options.

Figure 150. Lighting Adjustment Frustration Before and After Smart Device Installation

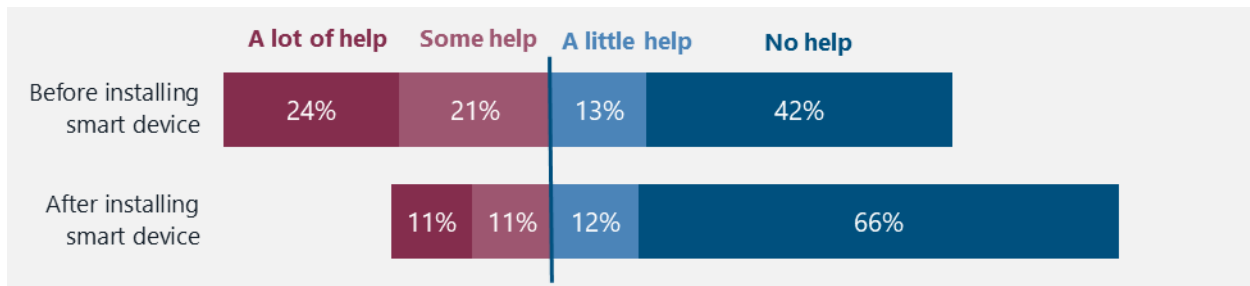


Source: Accessible Efficiency Participant Survey. “How often did you feel frustrated with adjusting lighting in your home [before/after] installing smart device(s)?” (n=39)

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A total of 38 respondents reported how much help they needed from others to control or manage lighting before and after smart device installation (Figure 151). Before installation, 45% reported needing *a lot of help* or *some help*. After installation, responses shifted toward greater independence, with 22% of respondents reporting they needed *a lot of help* or *some help*.

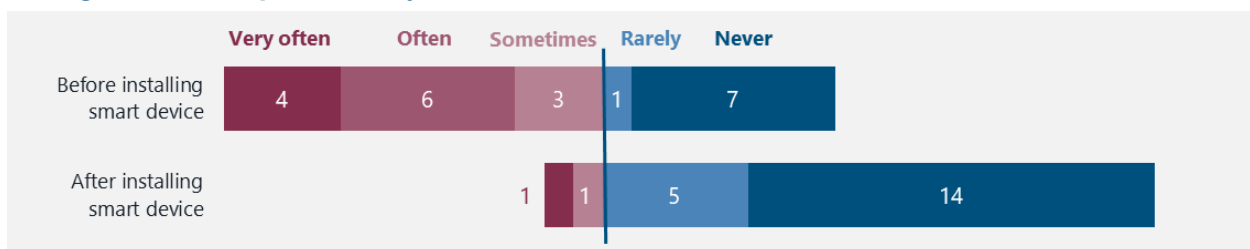
Figure 151. Lighting Management Assistance Before and After Smart Device Installation



Source: Accessible Efficiency Participant Survey. “How much help did/do you need from others to control or manage lighting in your home [before/after] installing smart device(s)?” (n=38)

Twenty-one respondents reported how often they felt frustrated when adjusting the temperature in their homes before and after smart device installation (Figure 152). Before installation, 13 of the 21 respondents reported *sometimes*, *often*, or *very often* feeling frustrated when adjusting their home temperature. After installation, the number of respondents selecting these options decreased to two.

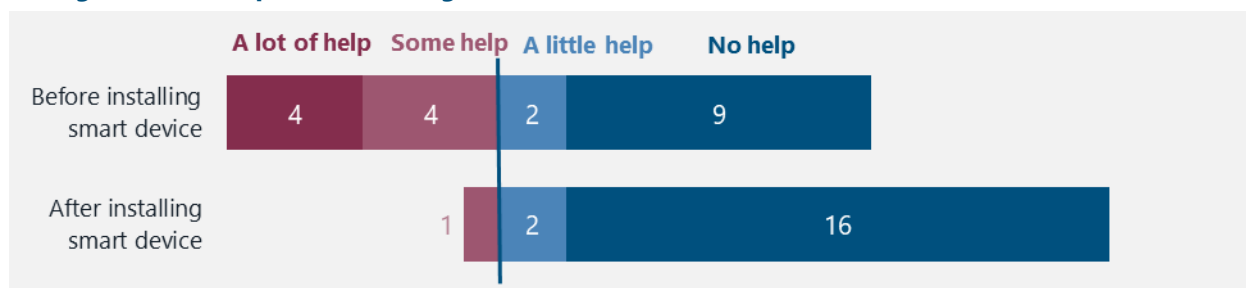
Figure 152. Temperature Adjustment Frustration Before and After Smart Device Installation



Source: Accessible Efficiency Participant Survey. “How often did/do you feel frustrated with adjusting temperature in your home [before/after] installing smart device(s)?” (n=21)

Nineteen respondents provided information on how much help they required from others to manage home temperature before and after installation (Figure 153). Prior to installation, eight respondents reported needing *some help* or *a lot of help*. After installation, only one respondent reported needing *some help*.

Figure 153. Temperature Management Assistance Before and After Smart Device Installation



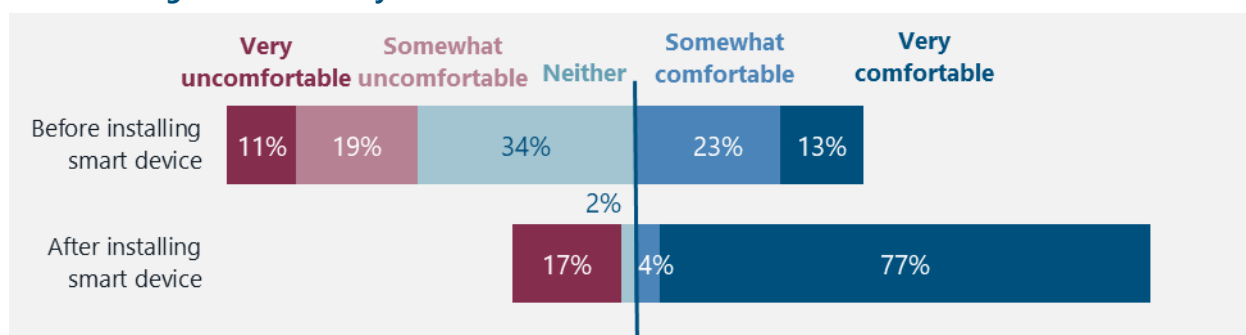
Source: Accessible Efficiency Participant Survey. “How much help did/do you need from others to control or manage temperature in your home [before/after] installing smart device(s)?” (n=19)

The evaluation team asked respondents to rate their comfort in their primary room, considering lighting, temperature, and air quality, both before and after the installation of smart devices. The survey measures responses on a five-point scale ranging from *very uncomfortable* to *very comfortable*.

As shown in Figure 154, prior to installation, 36% of respondents reported feeling *very comfortable* or *somewhat comfortable*. Following installation, responses were concentrated at the highest comfort level, with 81% reporting that they felt *very comfortable* or *somewhat comfortable*.

Eight respondents (17%) reported feeling *very uncomfortable* after installation, representing a 6% increase from before installation. Five of these respondents experienced reduced comfort after installation. Three of these five provided comments, most of which described technical issues with their installed measures or concerns about not receiving a measure they had expected. No additional information was provided to explain the reduced comfort reported by the other two respondents.

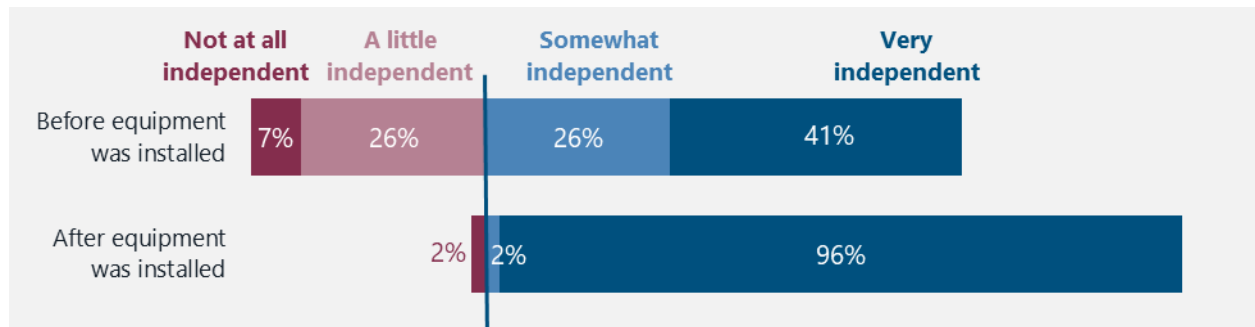
Figure 154. Primary Room Comfort Before and After Smart Device Installation



Source: Accessible Efficiency Participant Survey. “How comfortable do you feel in your primary room, in terms of lighting, temperature, and air quality [before/after] installing smart device(s)?” (n=47)

To assess changes in independence, the survey asked participants to rate how independent they felt at home before and after equipment installation, using a 4-point scale ranging from *not independent at all* to *very independent*. Before installation, 67% reported feeling *very independent* or *somewhat independent* (Figure 155). After installation, responses shifted toward the highest level of independence, with only two percent reporting lower levels of independence.

Figure 155. Independence in the Home Before and After Equipment Installation

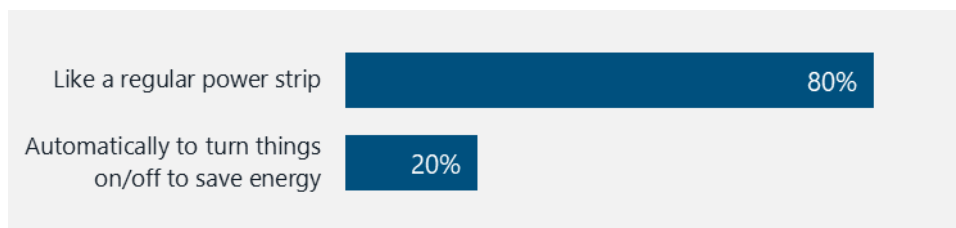


Source: Accessible Efficiency Participant Survey. "Overall, how independent did you feel in your home [before/after] the equipment was installed?" (n=46)

Verification of Installed Measures and Ongoing Use

The survey asked participants how they use the measures installed in their homes. Among respondents who received an advanced power strip, 45 responded about how they are using the device (Figure 156). Eighty percent reported using the device like a regular power strip, while 20% reported that they allow the advanced power strip to automatically turn devices on and off to save energy.

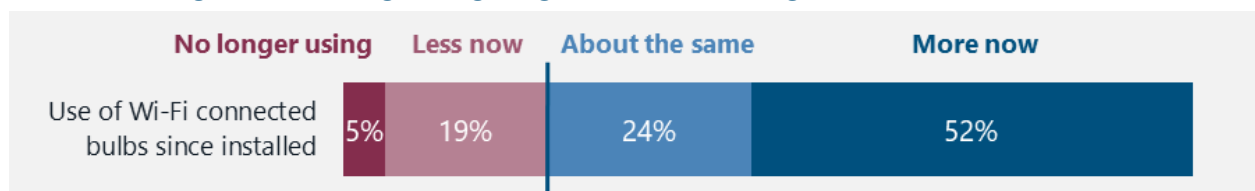
Figure 156. Use of Advanced Power Strips



Source: Accessible Efficiency Participant Survey. "How are you using your advanced power strip?" (n=45)

Thirty-seven respondents provided information about how their use of Wi-Fi connected bulbs had changed in the rooms where they were installed the pilot measures (Figure 157). Fifty-two percent of respondents reported using the lights *more now* than before participation and 24% are using the bulbs less or not at all after installation.

Figure 157. Change in Lighting Use After Installing Wi-Fi Connected Bulbs

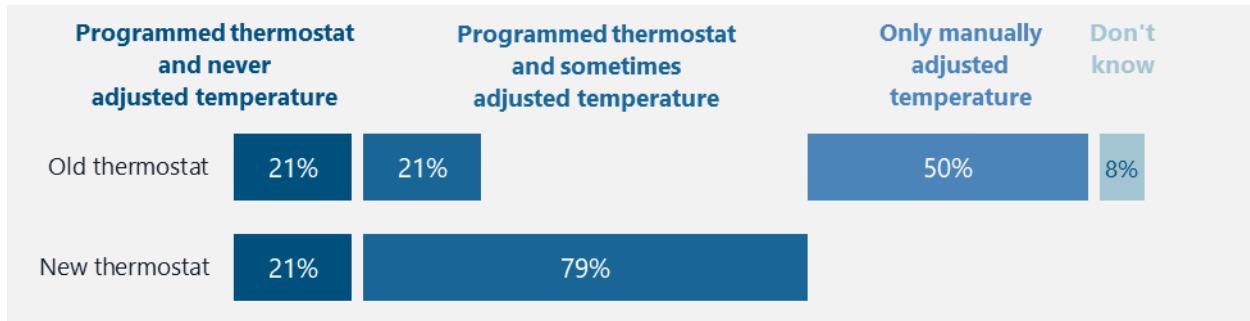


Source: Accessible Efficiency Participant Survey. "Thinking about the rooms where the Wi-Fi connected bulbs were installed, do you use those lights more, less, or about the same?" (n=37)

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When describing the use of their old thermostat, 50% of respondents reported that they only manually adjusted the temperature, and 21% programmed the thermostat and sometimes adjusted it. Following installation of the new smart thermostat, a majority of respondents (79%) reported that they program the thermostat and sometimes adjust the temperature.

Figure 158. Use of the [Old/New] Thermostat



Source: Accessible Efficiency Participant Survey. "Which best describes how you used/use your [old/new] thermostat?" (n=14)

Thirty-five respondents reported changes to their energy bills after receiving smart devices or home upgrades through Focus on Energy. Among these respondents, 48% reported a *moderate decrease* in their bills, and 9% reported a *significant decrease*. Forty percent of respondents saw *no change* in their energy bills, and one respondent (3%) noted an *increase*.

Awareness of Focus on Energy Programs and Energy Efficiency

The evaluation examined whether participation in the pilot increased awareness of Focus on Energy programs and enhanced participants' knowledge of energy efficiency.

Community-Based Organization Interviews

The evaluation team asked the partnering CBOs about their awareness of Focus on Energy programs before and after their partnership. Both CBOs reported limited awareness, but one noted that the partnership increased their awareness. One staff member shared that they had recently received an incentive after installing an energy-efficient furnace and smart thermostat in their home. This CBO intends to periodically review Focus on Energy offerings, though without a formal process.

The other CBO described building its knowledge of Focus on Energy incrementally through the partnership itself, noting, "I have more knowledge of Focus on Energy after going through the program, listening at the lunch and learn, and then helping people get familiar with what it is." This CBO also acknowledged a broader gap in energy efficiency knowledge, stating, "I think I need a little more training."

Trade Ally Interview

The trade ally reported familiarity with Focus on Energy offerings prior to partnering with the pilot, yet they did provide some insight into participant awareness through anecdotal conversations during home visits. They noted that many participants were not previously familiar with Focus on Energy, yet during their home visit, these same participants requested more information about other programs, most notably

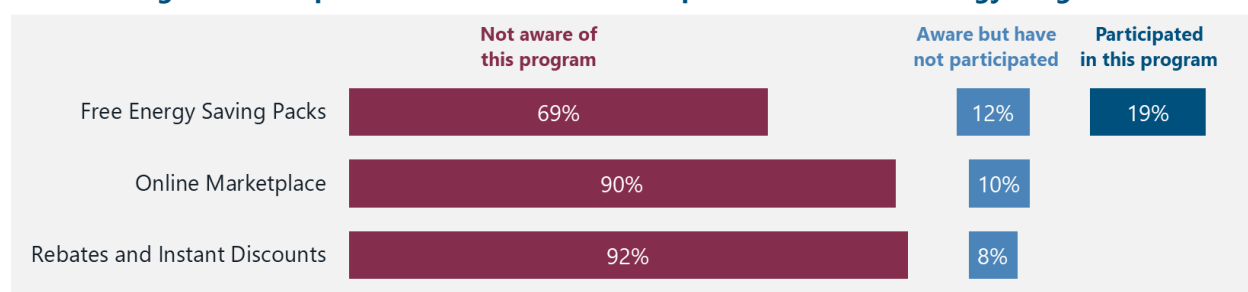
weatherization. In those cases, the trade ally directed interested participants to the Focus on Energy website.

Participant Survey

Fifty-two respondents reported whether they were aware of Focus on Energy prior to participating in the Accessible Efficiency Pilot. Twenty-five percent reported they were aware of Focus on Energy before participating, while 75% reported they were not aware.

Respondents were asked whether they were aware of or had participated in other Focus on Energy programs (Figure 159). Respondents reported the highest awareness and participation in the Free Energy Saving Packs Program. This was also the only program that respondents had participated in. Respondents reported similar levels of awareness of the Online Marketplace Program, rebates, and instant discounts. When prompted for additional feedback, two respondents reported interest in weatherization services.

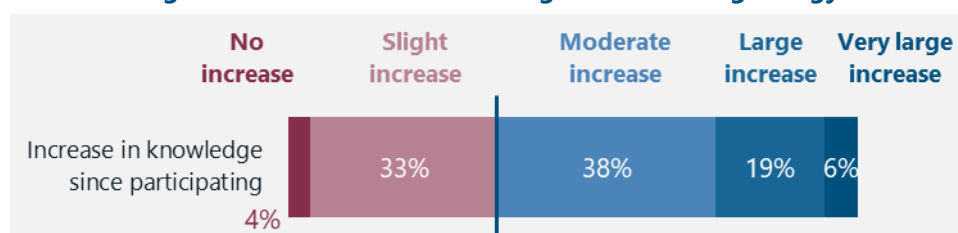
Figure 159. Reported Awareness and Participation in Focus on Energy Programs



Source: Accessible Efficiency Participant Survey. "For each of the Focus on Energy programs listed below, please indicate if you are now aware of or have participated in any?" (n=53)

Forty-eight respondents reported how much their knowledge of energy efficiency and energy savings had increased since participating in the pilot. Sixty-three percent of respondents reported a *moderate, larger, or very large increase* in knowledge.

Figure 160. Increase in Knowledge About Saving Energy



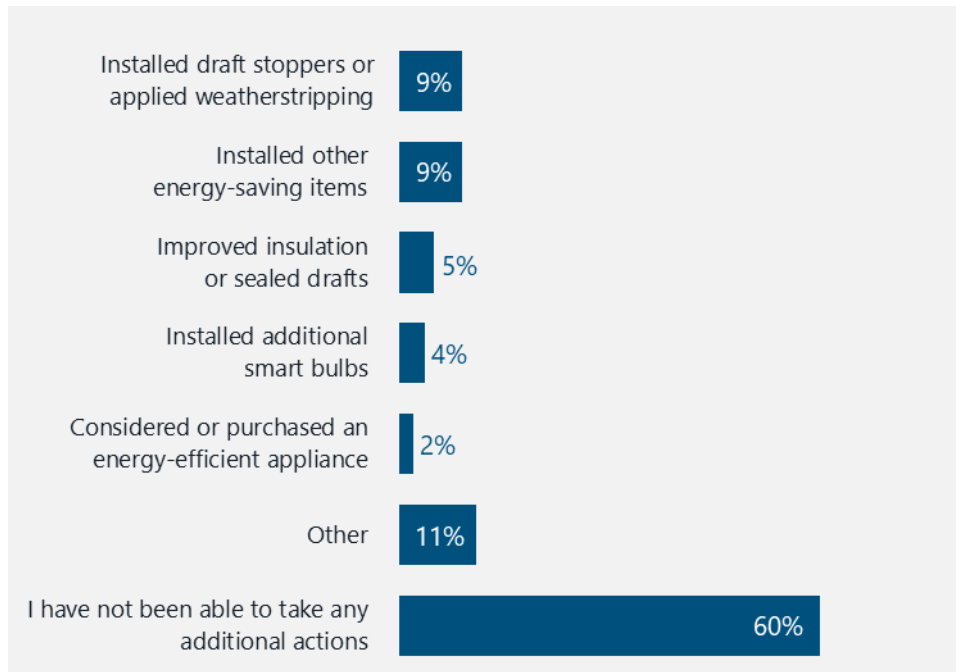
Source: Accessible Efficiency Participant Survey. "How much has your knowledge about energy efficiency / saving energy increased since participating in the program?" (n=48)

Energy Use and Behavioral Outcomes

To assess follow-up behavior, respondents were asked whether they had taken additional actions to improve energy efficiency or save energy since participating in the pilot. As shown in Figure 161, the majority of respondents (60%) reported that they had not taken any additional steps to improve energy efficiency. Smaller groups reported actions such as installing draft stoppers or weatherstripping (9%) or

adding other energy-saving items (9). An additional 11% selected “Other” without specifying the action taken.

Figure 161. Additional Energy-Efficient Actions Taken Since Participation



Source: Accessible Efficiency Participant Survey. “Have you taken any additional actions to be energy efficient / save energy since participating in the program?” (n=47). Multiple choice allowed.

Of the respondents who reported taking at least one energy-efficient action, 14 indicated whether participation in the Accessible Efficiency Pilot motivated them to do so. Twelve respondents reported that the pilot motivated their actions, while two reported that it did not.

16.1.3. Outcomes and Recommendations

The evaluation team offers the following outcomes and recommendations for the Accessible Efficiency Pilot based on the CY 2025 evaluation.

Outcome 1. Across both lighting and temperature management, participants reported meaningful improvements in their day-to-day experience following measure installation. The results reflect not only reductions in reported frustration but also decreased need for assistance with managing household functions.

Outcome 2. Survey respondents reported higher levels of comfort in their primary room and greater overall independence following measure installation. Those who reported being *somewhat* or *very comfortable* increased by 45% (from 36% to 81%). Similarly, those reporting being *very independent* increased by 55% (from 41% to 96%). There is an observable shift in the overall response distribution from mixed comfort and independence levels prior to installation to higher comfort and independence.

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Outcome 3. Reported satisfaction was high across all pilot participants and partner areas. Survey respondents consistently reported positive experiences with the pilot process and measure implementation. Pilot partners reported satisfaction across both delivery and coordination roles, suggesting strong alignment in expectations and execution among participating stakeholders.

Both the CBOs and trade ally noted that the enrollment and qualification process was seamless and easy to complete. The consistency of this feedback across partner types highlights the simplicity of application and submission procedures as a key success factor of the pilot.

Overall, these findings indicate broad acceptance of the pilot design and implementation approach. Replicating streamlined enrollment, qualification, and documentation processes is recommended for future pilots and programs, as ease of participation appears to support partner satisfaction and efficient implementation.

Outcome 4. Eligibility requirements could be clarified to support partnering CBOs. One CBO understood the eligibility requirement to be that customers had to attest to both having a disability and being a senior citizen (65+). Although this CBO worked closely with senior citizens, they were under the impression that younger individuals with disabilities were ineligible to participate. The implementation team is aware of this gap in understanding and has worked directly with the CBO to clarify eligibility requirements and address the misunderstanding.

Recommendation 4. Clarify and reinforce eligibility criteria in application materials and partner training. For example, as eligibility is based on attesting to having a disability or being a senior citizen (65+), this distinction should be communicated using clear, plain language on application forms and supporting materials, with emphasis on the “or” requirement. If not already provided, a brief eligibility reference guide or FAQ could further support consistent understanding across partners.

Outcome 5. Communication needs vary between CBO partners. One CBO reported that while the overall communication cadence with Focus on Energy was appropriate, certain updates could be communicated more efficiently via email rather than weekly meetings.

Recommendation 5. Establish individualized partner check-in formats (meetings, emails, etc.) based on each partner’s preferences and availability.

Outcome 6. The measure selection process was not always understood by participants, leading to dissatisfaction among some. While 80% of respondents reported high satisfaction with the installer's helpfulness, a small percentage reported being not too satisfied or not at all satisfied with the installer's ability to explain smart devices or home upgrades. In addition, some survey respondent comments reflected uncertainty about why specific upgrades were not included, and one CBO reported hearing similar concerns from two to three individuals.

Recommendation 6. Ensure trade allies clearly explain compatibility limits and the criteria used to determine which measures are recommended and installed. This could include providing a brief, standardized explanation during the installation visit and, where feasible, documenting measures considered but not installed, along with a short rationale. Strengthening communication around measure

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selection may improve participant understanding and reduce confusion about why certain upgrades were not included.

Outcome 7. Participants' awareness of and participation in other Focus on Energy programs were relatively low. Relatively few (19%) respondents reported participating in another Focus on Energy program. A majority (92%) reported being unaware of residential rebates and instant discounts.

Recommendation 7. Continue directing outreach to this customer population to increase awareness of other available programs. There is a continued opportunity to increase cross-program awareness through follow-up communications or coordination with CBO partners.

Outcome 8. Pilot participation is encouraging participants to take additional energy-saving actions. Since participating in the pilot, 41% of respondents have taken additional energy-efficient actions at home. Among those who reported taking an action, most (12 of 14 respondents) attributed their behavior change to participation in the pilot.

Recommendation 8. Reinforce energy-saving behaviors through follow-up engagement. Given that a portion of survey respondents reported taking additional actions and attributed them to the pilot, the program may consider incorporating brief post-installation touchpoints (e.g., educational materials, reminders, or check-ins) that highlight additional low- or no-cost energy-saving opportunities.

Outcome 9. Lack of clarity about the home assessment caused discomfort for some participants. The trade ally reported that some participants were unsure why detailed questions about their homes were being asked as part of the assessment, aside from the discussion of the installed measures. For some, this lack of clarity raised concerns that there might be an undisclosed issue with their home.

Recommendation 9. Provide future program partners, including CBOs and trade allies, with guidance on how to communicate the home assessment process, including clear, upfront messaging about the purpose and scope of home-related questions. If not already developed, consider providing a brief "What to Expect" resource to share in advance.

Outcome 10. Satisfaction with follow-up visits was less consistent than in other pilot categories, with both gaps in delivery and higher levels of dissatisfaction reported. While most respondents who received a follow-up visit reported being *very satisfied* (78% of 32 respondents), 12% reported the visit was *not too satisfactory* or *not at all satisfactory*. This represents the highest concentration of dissatisfaction among the satisfaction categories. In addition, five respondents reported not receiving a follow-up visit. Taken together, these findings suggest that follow-up visits were not always consistently delivered and, when conducted, were not uniformly satisfactory.

Recommendation 10. Consider establishing clear expectations regarding timing, scope, and communication of follow-up activities. Tracking completion of follow-up visits and confirming receipt with participants could help ensure consistency and improve satisfaction.

16.2. Community Impact Pilot

The Focus on Energy Community Impact Pilot supports community-based small businesses in deploying energy-efficient measures to reduce their energy use, thereby enabling them to remain valuable members of the community. The pilot seeks to demonstrate the benefits and positive impact of partnerships between Focus on Energy and key community stakeholders in supporting small businesses. The pilot targets three to five geographically diverse communities per year. Qualifying businesses are eligible to receive up to \$30,000 in financial incentives, but the amount cannot exceed 100% of the total project cost.

Eligible communities must meet the following criteria:

- The community receives electricity and natural gas from participating utilities.
- Strong presence of small businesses within the community limits.
- There is an established network or accessibility to trade allies within 25 miles of the community.
- There is a presence of CBOs.

Eligible customers must meet the following criteria:

- Have a strong local presence and close ties to the community.
- Have a business size of five to 100 employees on site and not be a home-based business.
- Have applicable energy efficiency upgrade opportunities and limited historical participation in Focus on Energy.
- Be financially willing and able to support upgrade costs.
- Can legally consent to energy efficiency upgrades.

In CY 2025, the evaluation team only conducted impact evaluation activities for the Community Impact Pilot. Those findings are summarized below.

16.2.1. Impact Evaluation

This section presents the evaluation team's CY 2025 impact evaluation methodology and results for the Community Impact Pilot. The evaluation team separated pilot projects and associated savings from other nonresidential programs. Therefore, the pilot savings presented in this chapter are in addition to those reported in the nonresidential program chapters.

Table 165 summarizes the performance and savings impacts of the Community Impact Pilot in CY 2025.

Table 165. CY 2025 Community Impact Pilot Summary

Item	Units	CY 2025	Pilot to Date (CY 2024 and CY 2025)
Incentive Spending	\$	\$794,166	\$1,991,945
Participation	Number of Participants	56	107
	Total Measures	157	294
Verified Gross Lifecycle Savings	kWh	4,483,068	15,780,409
	kW Summer Peak	63	196
	kW Winter Peak	0	0
	therms	379,042	929,567
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%	100%
Annual NTG Ratio	% (MMBtu)	100%	100%
Net Annual Savings	kWh	306,823	1,104,385
	kW Summer Peak	63	196
	kW Winter Peak	0	0
	therms	21,412	57,963
Net Lifecycle Savings	MMBtu	53,200	146,799
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	0.63	0.82

Impact Evaluation Methodology

The evaluation team designed its CY 2025 impact EM&V approach to integrate multiple perspectives in assessing the pilot. The team used the following approaches to measure the impact of the Community Impact Pilot:

- Tracking database review
- Engineering desk reviews
- Verification Interviews
- Engineering savings calculations

Table 166 lists the specific sample sizes the team used for the impact evaluation of the Community Impact Pilot. Additional details about these activities are discussed below.

Table 166. CY 2025 Community Impact Pilot Evaluation Activities and Sample Sizes

Total Measures	Impact Evaluation Sample		
	Desk Reviewed Measures	Verified Measures	% Sampled (by <i>Ex Ante</i> MMBtu savings)
157	12	2	26%

Tracking Database Review

The evaluation team reviewed the census of records in Focus on Energy’s database, SPECTRUM. This involved thoroughly reviewing the data to ensure SPECTRUM totals matched the administrator’s reported

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totals and to check that complete and consistent information was applied across data fields (e.g., measure names, first-year savings applications, EUL).

Evaluation Sampling

The evaluation team sampled 12 measures by random sampling. However, due to the small size of individual measures and the prescriptive nature of the program, the team did not select census measures. The 12 measures represent 26% of the total pilot population by lifecycle *ex ante* MMBtu.

Engineering Desk Review and Interviews

The evaluation team conducted engineering desk reviews of 12 Community Impact projects. Several of these reviews also involved an interview or email exchange with the site contact to verify key parameters of the measure, collect additional site photos, discuss operating schedules, and obtain additional trend data. The team reviewed all available project documentation in SPECTRUM and assessed the savings calculations and methodology applied by the implementer. The evaluation team also collected savings calculations directly from the implementer.

Verified Gross Savings Results

Table 167 lists the first year and lifecycle realization rates for the Community Impact Pilot in CY 2025. Overall, the program achieved first-year and lifecycle realization rates of 100%, weighted by total energy savings (MMBtu). The evaluation team found several small deviations in the sampled measures, with all maintained within $\pm 5\%$ of a 100% MMBtu realization rates. The following describes the main factors affecting realization rates:

- The evaluation team adjusted the savings calculation inputs for one measure to align with the information provided for the installed measure. Adjustments included modifying the calculation of EER2 based on the SEER efficiency rating provided in the application specification. The lifecycle MMBtu realization rate of 100.1%.
- The evaluation team adjusted the space type utilized for one measure to best align with the project information provided, resulting in a discrepancy in only the kW summer peak value, resulting in a realization rate 53%. The kWh and therm realization rates for this measure were both 100%.

Table 167. CY 2025 Community Impact Pilot First-Year and Lifecycle Realization Rates

First-Year Realization Rate					Lifecycle Realization Rate		
kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
100%	100%	N/A	100%	100%	100%	100%	100%

Table 168 summarizes verified first-year and lifecycle savings for the Community Impact Pilot.

Table 168. CY 2025 Community Impact Pilot First-Year and Lifecycle Verified Energy Savings Summary

Verified First-Year Savings					Verified Lifecycle Savings		
kWh	kW Summer	kW Winter	therms	MMBtu ^a	kWh	therms	MMBtu
306,823	63	0	21,412	3,188	4,483,068	379,042	53,200

Verified Net Savings

Due to the very targeted design of the pilot and high incentives, the evaluation team assumed a 100% NTG ratio for the Community Impact Pilot in CY 2023, CY 2024, and CY 2025.

16.3. Life Sciences Midstream Pilot

The Life Sciences Midstream Pilot incentivizes the purchase of energy-efficient ultra-low temperature (ULT) freezers and lab-grade refrigerators by providing incentives directly to distributors to influence purchasing decisions at the point of sale. Standard, larger-capacity ULT freezer models consume nearly as much energy as the average U.S. household, whereas an ENERGY STAR unit can cut this usage by more than half. Wisconsin fosters a dynamic biosciences growth market with 350-plus biotech and pharma businesses, 150-plus hospitals and medical centers, and more than seven universities/colleges engaged in life sciences research, making it an ideal market for this technology. The pilot is targeting the sale of 500 units.²⁸

In CY 2025, the evaluation team only conducted impact evaluation activities for the Life Sciences Midstream Pilot. Those findings are summarized below.

16.3.1. Impact Evaluation

This section presents the evaluation team’s CY 2025 impact evaluation methodology and results for the Life Sciences Midstream Pilot. The evaluation team separated pilot projects and associated savings from other nonresidential programs. Therefore, the pilot savings presented in this chapter are in addition to those reported in the nonresidential program chapters.

Table 169 summarizes the performance and savings impacts of the Life Sciences Midstream Pilot in CY 2025.

²⁸ Focus on Energy. "Life Sciences Midstream Pilot." <https://focusonenergy.com/about/future-focus/life-sciences-midstream-pilot>

Table 169. CY 2025 Life Sciences Midstream Pilot Summary

Item	Units	CY 2025	Full Pilot (CY 2024 and CY 2025)
Incentive Spending	\$	\$234,000	\$471,700
Participation	Number of Participants	26	51
	Total Measures	218	444
Verified Gross Lifecycle Savings	kWh	11,728,316	24,324,414
	kW Summer Peak	112	233
	kW Winter Peak	43	43
	therms	0	0
Verified Gross Lifecycle Realization Rate	% (MMBtu)	100%	100%
Annual NTG Ratio	% (MMBtu)	100%	100%
Net Annual Savings	kWh	977,365	2,027,038
	kW Summer Peak	112	233
	kW Winter Peak	43	43
	therms	0	0
Net Lifecycle Savings	MMBtu	40,017	82,995
Cost-Effectiveness	TRC Test: Benefit/Cost Ratio	1.06	1.02

Impact Evaluation Methodology

The evaluation team designed its CY 2025 impact EM&V approach to integrate multiple perspectives in assessing the pilot. The team used the following approaches to measure the impact of the Life Sciences Midstream Pilot:

- Tracking database review
- Engineering desk reviews
- Verification interviews
- Engineering savings calculations

Table 170 lists the specific sample sizes the team used for the impact evaluation of the Life Sciences Midstream Pilot. Additional details about these activities are discussed below.

Table 170. CY 2025 Life Sciences Midstream Pilot Evaluation Activities and Sample Sizes

Total Measures	Impact Evaluation Sample		
	Desk Reviewed Measures	Verified Measures	% Sampled (by <i>Ex Ante</i> MMBtu savings)
218	13	2	21%

CADMUS

Tracking Database Review

The evaluation team reviewed the census of records in Focus on Energy’s database, SPECTRUM. This involved thoroughly reviewing the data to ensure SPECTRUM totals matched the administrator’s reported totals and to verify that the energy data was complete and consistent across data fields (e.g., measure names, first-year savings applications, EUL).

Evaluation Sampling

The evaluation team sampled 13 measures at random. Due to the small size of individual measures and the prescriptive nature of the program, the team did not select measures using a census approach. The 13 measures represent 21% of the total pilot population by *ex ante* lifecycle MMBtu.

Engineering Desk Review and Interviews

The evaluation team conducted engineering desk reviews of 13 Life Sciences Midstream Pilot projects. Several of these reviews also involved an interview or email exchange with the site contact to verify key parameters, collect additional site photos, discuss operating schedules, and obtain additional trend data. The team reviewed all available project documentation and assessed the savings calculations and methodology applied by the implementer. The team also collected savings calculations directly from the implementer.

Verified Gross Savings Results

Table 171 lists the first year and lifecycle realization rates for CY 2025. The evaluation team found that all sampled project realization rates were 100%; therefore, the pilot achieved overall first-year and lifecycle realization rates of 100% for all savings types.

Table 171. CY 2025 Life Sciences Midstream First-Year and Lifecycle Realization Rates

First-Year Realization Rate					Lifecycle Realization Rate		
kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu
100%	100%	100%	100%	100%	100%	100%	100%

Table 172 summarizes verified first-year and lifecycle savings for the Life Sciences Midstream Pilot.

Table 172. CY 2025 Life Sciences Midstream First-Year and Lifecycle Verified Energy Savings

Verified First-Year Savings					Verified Lifecycle Savings		
kWh	kW Summer	kW Winter	therms	MMBtu	kWh	therms	MMBtu ^a
977,365	112	43	0	3,335	11,728,316	0	40,017

Verified Net Savings

Due to the very targeted design of the pilot and high incentives, the evaluation team assumed a 100% NTG ratio for the Life Sciences Midstream Pilot in CY 2025.