

Integrated Demand-Side Management Program

	Mission
SW Program: Integrated Demand Side Management	The California Long Term Energy Efficiency Strategic Plan (Strategic Plan) encourages programs that integrate the full range of demand-side management (DSM) options: energy efficiency (EE), demand response (DR), and distributed generation (DG) as fundamental to achieving California’s strategic energy goals. This program presents the coordinated effort that the IOUs will make in full collaboration with the CPUC Energy Division. The IOUs have identified integrated DSM (IDSM) as an important priority. In the IOUs’ 2009-2011 EE applications, each IOU has included separate exhibits on IDSM as well as specific integration activities within each PIP at the statewide and local program level, as instructed by the CPUC. In addition, each IOU has proposed individual series of activities, pilots and other programs in response to the Strategic Plan's DSM Coordination and Integration Strategy. Through all of these approaches, IDSM will be advanced in significant ways. In addition to each IOU’s individual IDSM activities and pilots, the IOUs are proposing a statewide IDSM effort that will establish a Statewide Integration Task Force (Task Force). Efforts of the Task Force will encompass activities that promote in a statewide-coordinated fashion IDSM strategies identified in the strategic Plan,

CA EESP Goals/Strategies Addressed by SW <u>Sub-program</u>:	CA EESP Ref. pp. #
Goal: Deliver integrated demand side energy management options that include efficiency, demand response, energy management, and self-generation measures through coordinated marketing and regulatory integration.	p. 72
Strategy 1-1: Carry out integrated marketing of IDSM opportunities across all customer classes.	p. 73
Strategy 1-2: Contact IDSM delivery pilots in the residential, commercial, industrial, and agricultural sector.	p. 73
Strategy 1-3: Develop IDSM programs across resources, including energy, water, and transportation.	p. 73
Strategy 1-4: Promote development and support of new technologies that enable or facilitate IDSM coordination and integration.	p. 73

Short-term (2010-2012) “SMART” <u>Sub-program</u> Objectives:	Source (SP, AL, DR, PIP, or Staff)*	IOU Comments
		Consolidated into # 5, below.

1. By the end of 2012, Utilities establish lessons learned and best practices to support the above via their integrated pilot program offerings in every customer segment (commercial, residential, industrial, agriculture) to ramp up integrated program and incentive offerings. (yes/no objective).	D.09-09-047 p. 211 Statewide PIP p. 4 (PG&E)	
3		Move to Long Term Study
2. By the end of 2011, complete a white paper that evaluates the feasibility of developing a cost-effectiveness methodology for integrated projects. (yes/no objective).	D.09-09-047 p. 210 Statewide PIP p. 2 (PG&E)	Keep consistent with PIP and Decision.
3. By the end of 2012, complete a white paper with metrics & reporting mechanisms for tracking success of integrated efforts consistent w/ EM&V (yes/no objective).	D.09-09-047 p. 211 Statewide PIP p. 3 (PG&E)	
4. By the end of 2012 make recommendations for integrated program funding and recommended changes to inhibiting policies (yes/no objective).	Statewide PIP p. 6 (PG&E)	
5. By end of 2012, 100% relevant IOU program staff are aware of how integration relates to and impacts their programs including integration of demand side resources in the form of program offerings, implementation, and funding / incentive processing, marketing, education, and outreach (yes/no objective).	Statewide PIP p. 6 (PG&E)	
6. By the end of 2011, Integrated emerging technologies will be identified that have been or are being developed in this budget cycle ; that rely on co-funding from EE and DR; or that incorporate DG are not funded by DG. Use this information to identify and provide recommendations to overcome barriers (including policy barriers, internal IOU barriers and barriers with 3 rd parties) to include integrated technologies in appropriate DSM programs, projects or pilots.	D.09-09-047 p. 211 Statewide PIP p. 3 (PG&E)	Process for identifying integrated emerging technologies should be done in the ET program. In IDSM, we are tracking the status of the identified technologies.
7. By the end of 2012 integrated audit tools will be offered through utility funded programs (including EE, DR, DG recommendations) (yes/no objective).	D.09-09-047 p. 215	Comments relate discussion of group that non-integrated audits will also be available to customers, but that the Decision requires development of integrated audit tools.
8. By the end of 2012, [X% of] commercial, industrial, residential, and agriculture program participants are aware of IDSM opportunities and practices.		
- 9. By end of 2012 integrated audit participants in all customer classes that implement recommended measures (either utilizing incentives or not) in at		This is not a directive of IDSM in the Decision or in the PIP

least 2 out of the 3 IDSM resource categories (EE, DG, DR), or other recommended technical, process and practice improvements (track which categories being implemented) that result in more integrated demand side resource utilization are tracked		

Short-term <u>Sub-program</u> PPMs:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (2a or 2b)**	Baseline Study Required (Y/N)	IOU Comments
a. 100% Awareness and knowledge among relevant IOU program staff (to be specified – e.g. account reps, engineers that administer the audit (3 rd party); program designers and managers) regarding how IDSM relates to and impacts their efforts and programs	Statewide PIP p. 6 (PG&E)	2a	N	Relevant staff would be determined as part of the study – not a 2b metric, because the information would be used to inform the next program cycle, but wouldn't be done annually either.
2. Complete and make available integrated audit tools (on line and on-site) to res and non-res customers (include EE, DR, DG recommendations). (Y/N)	D.09-09-047 p. 215	2b	N	Modified for consistency with the objective and to allow for integrated and non-integrated options
3.				
	D.09-09-047 p. 215	2a	N	Combined with the audit metric, above.
2. A status report that identifies how well “integrated” (EE, DR, DG) all IOU demand side energy program offerings and components are (ex: CEI,	D.09-09-047 p. 211	2a/2b	N	Not annually, but in time to influence next

Commercial, Ag, Industrial, Residential, Audits) including lessons learned, best practices, improvement plans, and how the program portfolio is addressing strategic planning goals and objectives / Decision directives with regard to integration and all the IDSM program objectives listed here. The report will review how the IOUs have developed internal and external frameworks that support integration of IDSM programs and technologies. (Y/N)	Statewide PIP p. 4 (PG&E)			program cycle
5. Program participant awareness of IDSM practices in each of the market sector subprograms:.	PIPs	2b	Y	Moved from the Segment programs for consistency and reporting in one place

Long-Term (2013-2020) "SMART" Sub-program Objectives:	Source (SP, AL, DR, PIP, or Staff)*	IOU Comments
1. By 2015, X% of customers aware of online and onsite integrated audits	D.09-09-047 p. 215	Percentages to be determined after short term studies and baseline
2. By 2015, X% of customers have participated in integrated audits and X% of integrated audit participants (by audit type) have implemented one or more of the audit recommendations (indicate how many incentivized vs. non-incentivized)	D.09-09-047 p. 215	
3. By 2015, X% of customers in the different customer classes are aware of integrated programs or incentive opportunities as a result of local integrated marketing collateral	IOU / ED Staff Statewide PIP p. 6 (PG&E) D.09-09-047 p. 211 Statewide PIP p. 4 (PG&E)	
4. By 2015 complete a process evaluation that identifies how well "integrated" (EE, DR, DG) all IOU demand side energy program offerings and components are (ex: CEI, Commercial, Ag, Industrial, Residential, Audits) including estimated savings of integrated programs and projects, lessons learned, improvement plans, and how the program portfolio is addressing strategic planning goals and objectives / Decision directives with regard to integration.	D.09-09-047 p. 211 Statewide PIP p. 4 (PG&E)	

Evaluation will include water conservation, GHG and waste reduction strategies (Y/N)		
5.		
6.		Not part of approved IDSM PIP – should be in ZNE metrics

*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

Long-Term Sub-program MT Indicators:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (3)**	Baseline Study Required (Y/N)	IOU Comments
1. Percent of customers who are aware of online and onsite integrated audits	D.09-09-047 p. 215	3	N	
2. Percent of customers in each customer class who have received an integrated audit and percent of these customers (by audit type) who have implemented one or more of the audit recommendations (indicate how many incentivized vs. non-incentivized)	D.09-09-047 p. 215	3	N	
3. Percent of customers in each customer classes who are aware of integrated programs or incentive opportunities as a result of local integrated marketing collateral (indicate how many of these customers have participated in an integrated program (one that promotes EE, DG, and DR)	IOU / ED Staff Statewide PIP p. 6 (PG&E) D.09-09-047 p. 211 PIP p. 4 (PG&E)	3	N	
4. A process evaluation that identifies how well “integrated” (EE, DR, DG) all IOU demand side energy program offerings and components are (ex: CEI, Commercial, Ag, Industrial, Residential, Audits) including estimated savings of integrated programs and projects, lessons learned, improvement plans, and how the program portfolio is addressing strategic planning goals and objectives / Decision directives with regard to integration. . Evaluation will include water conservation, GHG and waste reduction strategies (Y/N)	D.09-09-047 p. 211 Statewide PIP p. 4 (PG&E)	3	N	
5.		3	N	

6.				See commen ts on the objective , above
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*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

**Metric type: 3 = data collection, tracking, and reporting [by IOUs, CPUC staff, and/or other entities] to be determined later.