

## Integrated Demand-Side Management Program

	<b>Mission</b>
<b>SW Program: Integrated Demand Side Management</b>	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,

Elizabeth Lowe (PG&E IDSM) – they have identified the cross-overs with Ag, Ind, and Com and want to have that conversation in this meeting. Have provided in both a template format and an outline format; but our goal today is to review the short term objectives and the performance metrics.

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

<b>Short-term (2010-2012) “SMART” <u>Sub-program</u> Objectives:</b>	<b>Source (SP, AL, DR, PIP, or Staff)*</b>	<b>IOU Recommendations and Comments</b>

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1. By 2012, Utilities restructure internally to support integration of demand side resources in the form of program offerings, implementation, and funding / incentive processing, marketing, education, and outreach (yes/no objective).	IOU / ED Staff	Consolidated into objective #5, below.
2. By 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)	Revise to: 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).
3. By 2012 Water conservation, GHG and waste reduction strategies are significantly incorporated into integrated program offerings (yes/no objective).	D.09-09-047 p. 210	Move to long term study.
4. By 2011, complete a white paper on cost-effectiveness and evaluation methodologies (yes/no objective).	D.09-09-047 p. 210 Statewide PIP p. 2 (PG&E)	Revise to: By the end of 2011, complete a white paper that evaluates feasibility of developing a cost-effectiveness methodology for integrated projects. (yes/no objective).  Comment: Revised in order to keep consistent with PIP and Decision.
5. By 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)	Revise to: 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).
6. By 2012 complete a white paper on recommendations for integrated program funding and recommended changes to inhibiting policies (yes/no objective).	Statewide PIP p. 6 (PG&E)	Revise to: By the end of 2012 make recommendations for integrated program funding and recommended changes to inhibiting policies (yes/no objective).
7. By 2012, 100 % of IOU program staff understand how integration relates to and impacts their programs (yes/no objective).	Statewide PIP p. 6 (PG&E)	Revise to: 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).
8. By 2011, develop a process for identifying, recommending, and initiating promotion of enabling/supporting policies / technologies for inclusion in appropriate DSM programs (ex: Emerging Technologies Road Map – IDSM promoting technologies) (yes/no objective).	D.09-09-047 p. 211 Statewide PIP p. 3 (PG&E)	Revise to: 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

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		<p>incorporate DG are not funded by DG. Use this information to identify barriers and provide recommendations to overcome barriers (including policy barriers, internal IOU barriers and barriers with 3<sup>rd</sup> party utilities) to include integrated technologies in appropriate DSM programs, projects or pilots.</p> <p>Comment: Process for identifying integrated emerging technologies should be done in the ET program. In IDSM, we are tracking the status of the identified technologies.</p>
<p>9. By 2012 all audits offered through utility funded programs are fully integrated (including EE, DR, DG recommendations) (yes/no objective).</p>	<p>D.09-09-047 p. 215</p>	<p>Revise to: By the end of 2012 integrated audit tools will be offered through utility funded programs (including EE, DR, DG recommendations) (yes/no objective).</p> <p>Comment: Relate discussion of group that non-integrated audits will also be available to customers, but that the Decision requires development of integrated audit tools.</p>
<p>10. By 2012 complete a status report 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 lessons learned, improvement plans, and how the program portfolio is addressing strategic planning goals and objectives / Decision directives with regard to integration including all PPM objectives included here. (Yes / No Metric)</p>		<p>Revise to: By the end of 2012, [X% of ] commercial, industrial, residential and agriculture program participants are aware of IDSM opportunities and practices.</p> <p>By end of 2012 integrated audit participants in all customer classes that implement recommended measures (either utilizing incentives or not) in at least 2 out of the 3 IDSM resource categories (EE, DG, DR), or other recommended technical, process and practice improvements (track which categories are being implemented) that result in more integrated demand side resource utilization are tracked.</p>
<p>1. Jen proposed additional objective: By 2012 the IDSM task force will identify the overlap and barriers between integrated marketing and integrated audit tools to provide rate analysis information to customers. (Rationale: want to make sure using resources more effectively to so customers have the information they need when dynamic pricing goes into effect; coordinating and complementing information.) This may never happen because of timing issues.</p>		<p>Delete</p> <p>Comment: This is not in the scope of IDSM in the Decision or in the PIP</p>

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 Recommendations and Comments
<p>1. 100%- Percentage of relevant program implementation staff (needs to be specified – e.g. account reps, engineers that administer the audit (3<sup>rd</sup> party); program designers and managers) awareness and knowledge how integration relates to and impacts their programs</p> <ul style="list-style-type: none"> <li>- What are we trying to get to with the metric? How do you define “staff”? Jen: Trying to get at the integration of staff, and understanding among staff to drive IDSM integration. Lisa – this metric is trying to measure how much effort is going to getting staff integrated.</li> <li>- We are providing the progress reports on 8 directives, how is this measured and being effectively measured?</li> <li>- Perhaps we can identify the departments or parts that are relevant to IDSM</li> <li>- Athena – the manifestation of the work is more important than if the program staff actually understand or not. (they may not need to understand to actually implement this activity)</li> <li>- Elizabeth - Already reporting on training, and other activities that are happening to make the integration happen.</li> <li>- Lisa – wants to try to capture the staff understanding to be positive influence on getting the whole integration moving forward.</li> <li>- Jen Caron – want to see that staff is prepared going forward in preparation for the future program cycles to develop the foundation. Is the problem with the word “understanding” what are we getting to.</li> <li>- Simon – table it for now.</li> </ul>	<p>Statewide PIP p. 6 (PG&amp;E)</p>	<p>2° (wouldn't be valuable to measure at the end.</p>	<p>N</p>	<p>Revise to: Awareness and knowledge among relevant program staff (to be specified – e.g. account engineers that administer the audit (3<sup>rd</sup> party), program designers and managers) regarding IDSM relates to and impacts their efforts and programs.</p> <p>Metric type: 2a</p> <p>Comments: Relevant staff would be determined as part of study – not a 2b metric, because the information would be used to inform the next program cycle but wouldn't be done annually either.</p>



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<p>2. All audits for non-residential and residential customers are fully integrated (Y/N)          - Proposed modification (Elizabeth Lowe):  <del>Make an integrated audit tool available for res and non-res customers offer) at least two of three program components (DG, EE, or DR)</del>  <del>Integrated audit tools (on line and on site) will be available for residential and non-residential customers for all demand side resources.</del>  <b>All audit tools (on line and on-site) available to res and non-res customers will be integrated (EE, DR, DG). (Y/N)</b>          (on line are easier to integrate, but on-site audits are more difficult because of funding stream from DG. Process is a whole different animal.)          In a large integrated audit needs to be considered because there may not be resources to make those available to customers.          Could caveat "subject to availability of funding" and specify which segments for which it may be applicable.          Defining what is included in an audit – dynamic pricing may have significant effect on payback. Trying to look at the physical opportunities, but not integrated review of opportunities. Jen Caron noted that it is an important part to include, even if it isn't in there now.          - Appendix C is all about on-line</p>	<p>D.09-09-047 p. 215</p>	<p><b>2b</b></p>	<p><b>N</b></p>	<p>Revise to:          Complete and make available integrated audit tools (on line and on-site) to res and non-residential customers (include EE, DR, DG recommendations). (Y/N)</p> <p>Comment:          Modified for consistency with the objective and allow for integrated and non-integrated options</p>
<p>3. <del>Complete and make available an integrated on-line audit tool (Y/N) (duplicative of the above metric)</del></p>	<p>D.09-09-047 p. 215</p>	<p><b>2a</b></p>	<p><b>N</b></p>	<p>Combined with the audit metric, above.</p>
<p>4. A status report 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 lessons learned, 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 is completed. (Y/N)          - Would this be written by the task force? With a consultant?          To have any influence on the implementation it would need to be completed before 2012; wouldn't want it to be 2B; would</p>	<p>D.09-09-047 p. 211 Statewide PIP p. 4 (PG&amp;E)</p>	<p><b>2a</b></p>	<p><b>N</b></p>	<p>Revise to:          A status report that identifies how well "integrated" (EE, DR, DG) all IOU demand side energy program offerings and components are (ex: 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 IOU</p>

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<p>need to be 2A to impact what we will file. Go after the information that is most useful in getting the design of the programs oriented. (Off cycle with DR).</p>				<p>have developed internal and external frameworks support integration of IDSM programs and technologies. (Y/N)</p> <p>Metric type: 2a/2b</p> <p>Comment: Not annually, but in time to influence next program cycle.</p>
<p>5.</p>				<p>Add: Program participant awareness of IDSM practices in each of the market sector subprograms.</p> <p>Comment: Moved from the Segment programs for consistency and reporting in one place.</p> <p>Baseline required</p>

Long-Term (2013-2020) "SMART" <u>Sub-program</u> Objectives:	Source (SP, AL, DR, PIP, or Staff)*	IOU Recommendations and Comments
1. By 2015, X% of customers aware of online and onsite integrated audits	D.09-09-047 p. 215	Comment: Percentages to be determined after short terms 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	Comment: Percentages to be determined after short terms studies and baseline.
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	Comment: Percentages to be determined after short terms studies and baseline.



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	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. (Y/N)	D.09-09-047 p. 211 Statewide PIP p. 4 (PG&E)	Revise to: By 2015 complete a process evaluation that identifies well “integrated” (EE, DR, DG) all IOU demand side energy program offerings and components are (ex: C Commercial, Ag, Industrial, Residential, Audits) includ estimated savings of integrated programs and projects lessons learned, improvement plans, and how the program portfolio is addressing strategic planning goal and objectives / Decision directives with regard to integration. Evaluation will include water conservation GHG and waste reduction strategies (Y/N)

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

<b>Long-Term Sub-program MT Indicators:</b>	<b>Source (SP, AL, DR, PIP, or Staff)*</b>	<b>Metric Type (3)**</b>	<b>Baseline Study Required (Y/N)</b>	<b>IOU Recommendations and Comments</b>
1. Percent of customers who are aware of online and onsite integrated audits	D.09-09-047 p. 215	3	N	OK.
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	OK.
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)	3	N	OK.

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	) D.09-09-047 p. 211 PIP p. 4 (PG&E )			
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. (Y/N)	D.09-09-047 p. 211 Statewide PIP p. 4 (PG&E )	3	N	Revise to: 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 water reduction strategies (Y/N)

\*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.