

## **Joint IOU IDSM Compliance Tracking Report 3<sup>rd</sup> Quarter 2010**

This report is provided in compliance with CPUC Decision 09-09-047, which directs the Investor Owned Utilities (IOUs) to establish a Statewide Integrated Task Force and to file an Advice Letter that includes a detailed explanation of tasks, timelines, and role of the utility task force in addressing the eight integration tasks. This Advice Letter was approved in March 2010. Included in these tasks are "regular reports" (task 6). The Statewide Task Force has determined that quarterly reports, submitted one month after the last day of the quarter are an appropriate method for providing regular reporting of activities to the CPUC. Updates on each of the Integration Tasks are listed in more detail below and in the attached workbook.

### **Integration Tasks:**

- 1. Development of a proposed method to measure cost-effectiveness for integrated projects and programs including quantification and attribution methods that includes GHG and water reductions benefits and the potential long-term economic and electric / gas hedging benefits.**

#### **Strategy:**

The Task Force proposes to work with the Energy Division (ED) and to coordinate a workshop to gather stakeholder feedback to address the issue of cost effectiveness under an integrated delivery of EE, DR, CSI and DG programs and to establish a consensus on a framework for developing an integrated cost effectiveness methodology.

The Task Force will launch a phased approach to developing appropriate integrated cost effectiveness protocols for IDSM programs and projects.

The Task Force will coordinate a workshop to gather stakeholder feedback to address the issue of cost effectiveness under an integrated delivery of EE, DR, CSI and DG programs and to establish a consensus on a framework for developing an integrated cost effectiveness methodology.

#### **Statewide Accomplishments:**

The IDSM Task Force and individual IOUs launched a phased approach to develop appropriate integrated cost effectiveness protocols for IDSM programs and projects by first issuing a contract to develop a whitepaper on integrated cost effectiveness. This effort will also include a public workshop for review of the whitepaper and feedback/comments.

- A. Received 13 responses to RFI for consultant to develop white paper on integrated cost-effectiveness
- B. Sent RFI to the 13 vendors
- C. Received 3 proposals and vendor selected by SDG&E with input from Task Force
- D. Planning on kick off meeting with Black and Veatch on October 6

#### **Next Steps and Timing:**

- A. October – Finalization of whitepaper scope, development of research plan, and data collection
- B. November 29 – Draft conclusions circulated
- C. December 6 – In person meeting
- D. Dec /Jan 2011 – Draft white paper circulated to IDSM Task Force
- E. Expected public workshop

## **2. Development of proposed measurement and evaluation protocols for IDSM programs and projects.**

### **Strategy:**

The Task Force and individual IOUs will conduct a phased approach to developing appropriate EM&V protocols for IDSM programs and projects.

Task Force coordinated with the IOUs and ED EM&V resources to develop a proposal of appropriate metrics for assessing integration and the development of a white paper that will be publicly vetted.

### **Statewide Accomplishments:**

- A. Working to coordinate timing with cost-effectiveness effort

### **Next Steps and Timing:**

- A. Determine best timing – either parallel or sequentially to cost-effectiveness
  - a. Agreed with Energy Division to get preliminary results from cost-effectiveness before changing EM&V protocol also had action item for Lisa to look in to shifting time line for EM&V.
  - b. Since there is redundancy between cost-effectiveness and EM&V, efforts should be sequential.
- B. Propose new timing and deadlines to Energy Division
- C. Follow up on shift in EM&V deadline
- D. Follow current process of EM&V in other proceedings to allow for EM&V plans to be proposed, and approved by ED
- E. Work together to develop a plan will shorten review process

## **3. Review IDSM enabling emerging technologies for potential inclusion in integrated programs.**

### **Strategy:**

The IOUs individually and the Task Force as a group will track emerging technologies that have some combination of EE, DR and / or renewable self-generation capabilities, or other integrated relationships to potentially pilot integrated product offerings (not just through marketing) to customers.

### **Statewide Accomplishments:**

- A. Monthly collaboration/coordination conference call on a Statewide basis
- B. Included Emerging Technologies in Integrated Tracking Process
- C. ET Incubation Efforts
  - 1. Held two Statewide TRIO Symposiums, bringing together investors, entrepreneurs, researchers, and other professionals to explore how the utilities could help them speed their idea to market. Technology representatives from EE, DR, and DG were represented in the audience
    - o March 12, UC Santa Barbara, SCE Hosted
    - o September 23, UC Berkeley, PG&E Hosted
  - 2. The ET Open Forum is a statewide initiative designed to give manufactures and developers of new IDSM technologies an opportunity to discuss their products with the California utilities and

others for possible inclusion in future programs. Potential presenters of new technologies are screened and vended and 15-16 technologies were allowed to present at each of the ETCC Open Forums. One ETCC Open Forum was held this quarter with presentations from, EE, DR, DG, and storage companies.

- July 8, Monrovia, SCE Hosted
  - October 5, San Francisco, PG&E Hosted (planned)
- D. Joint sponsorship and coordination of ET Summit which is scheduled for November 7-9 at the Sacramento Convention Center. The ET Summit will give end users an opportunity to explore promising new technologies and learn about key policy considerations at the local, state and national levels. Presentations will include the latest innovations on EE, DR, and renewables.
- E. Identified Integrated Emerging Technologies to track (see Table 1)
- F. There are additional projects currently in the “initiation stage” and will be included in the Q4 report

**Table 1**

Technology Name	Description	Utility	Status
Water Energy Pilot project	This pilot project is focused on improving the energy efficiency of water utilities operations, through the use of energy data collected from their PG&E meters. This data is fed to their SCADA system, allowing the utility to monitor and control for energy efficiency in real-time	PG&E and SCE	ET Assessment completed August 2010. ET Assessment reports have been posted to the ETCC website.
Heat Pump Water Heaters	Water heaters with EE and DR capability	PG&E	Phase 1 – Laboratory testing of HPWH completed in March 2010.  Phase 2 – Laboratory and Field testing to be completed in Oct 2010.
Technology Assessment on Dimming/Controllable Ballasts	If technology is properly deployed and installed, this technology can achieve significant energy savings in the day-to-day use of building's lighting systems by enabling the lighting system to react to utility demand response signals, offers individuals and personal zone control, and real time price signals.	SCE	Technology in the process of being adopted into EE portfolio
Office of the Future	This advanced lighting for office spaces effort consists of coordinated ET and Emerging Markets & Technology projects at several customer sites. A key goal of these projects is to evaluate advanced energy efficient lighting systems that integrate daylighting controls, occupancy sensors, and Demand Response strategies.	SCE	Projects are ongoing. Results will be available starting Q1 2011.
Best Western Hotel Central Guest Room Controls	Evaluate EE and DR Measures of a centrally controlled Hotel Guest Room System	SDG&E	Finishing Report
Multi-Vendor HAN project	Integrate various Home Area Network Devices and Vendors together for a Complete DR for the Home Solution with a gateway, In-Home Display, Programmable Controlled Thermostat, and Load Controllers	SDG&E	Installing Devices
Hybrid Demand Control/Demand Response	Add Controls to Existing Hotel Energy Management System to Curtail Load at a Predetermined Set Point on a Daily Basis and a Lower Set Point During a DR Event	SDG&E	Finishing Report

**Next Steps:**

- A. Continue identifying and tracking integrated Emerging Technologies
  - B. SW ET team researching feasibility of incorporating DSM modifiers into the ETP Database.  
Working closely with SW ET Programs, the Energy Division developed and will maintain a project tracking database containing the variables and attributes to be tracked by all ET programs statewide. IOUs will report project data to the CPUC on a quarterly basis. The uniform naming convention agreed upon by the IOUs and PUC's ED will be used for tracking ET projects. The SW ETP managers are exploring the possibility of adding fields to the database that would identify IDSM prospective technologies.
  - C. IDSM Task force will collaborate with the SW ET team to determine timing associated with the technologies listed above, including when they will be available to the market, and/or incorporated into pilots, technology incentives or other programs and activities
4. **Development of cross-utility standardized integrated audit tools using PG&E's developed audits as a starting point.**

**Strategy:**

The IOUs are working to standardize a statewide audit and survey tools portfolio and customize audit recommendations based on customer profiles, operating characteristics, market sector potential and cost-effectiveness of the offering. This process will consider more meaningful ways to implement the audit and survey tools for the customer as well as identify choices of potential measures in various DSM programs or technologies specific to a particular customer.

**Statewide Accomplishments:**

- A. The IOUs had 4 Statewide Audit phone calls to coordinate on Statewide issues
- B. The IOUs worked with CPUC staff and program staff to develop a coordinated approach to Program Performance metrics and reporting
- C. The IOUs are coordinating on a SW basis to deliver an integrated audit tool with consistent business requirements
  - a. PG&E has secured a vendor
  - b. SCE and Sempra are conducting an RFP process (see Table 2 for schedule)
- D. The IOUs are investigating incorporation of a solar calculator with existing tools.

**Table 2**

<b>Key Event (Phase 1)</b>	<b>Key Date</b>
RFP Released	11/8/2010
Bidders Optional Conference (Webinar)	11/15/2010
Questions Due from Bidders'	11/18/2010
Answers to Bidders' Questions Provided on PEPMA	12/2/2010
Bidder Proposal Due- Phase 1	12/7/2010
Non-selected Bidders Notified	12/29/2011
Finalist Bidders Notified to advance to Phase 2	12/29/2011
<b>Key Event (Phase 2)</b>	<b>Key Date</b>
Bidders notified of Phase 2 Presentation Requirements and Presentation Schedule	12/29/2011
Pre-Presentation Questions Due from Bidders'	12/31/2010
Answers to Bidders' Presentation Questions Provided on PEPMA	1/4/2010
Bidders' Presentation	1/6/2011
Evaluation, Scoring, and Selection of Presentations Completed	1/6/2011
SCE Procurement to Notify Bidders "Selected Subject to Negotiations"	1/11/2011
Purchase Order Issued (As Early As)	2/17/2011 to 2/22/2011

**Next Steps and Timing:**

- A. PG&E is coordinating development of a solar calculator for the interim enhancement
- B. Integrated audit tool under development by IOUs to meet timing required by CPUC

- 5. Track integration pilot programs to estimate energy savings, develop best practices and lessons learned and develop standard integration best practices that can be applied to all IOU programs based on pilot program evaluations and the results of additional integration promoting activities (i.e. EM&V and cost-benefit results).**

**Strategy:**

The Task Force will regularly review various programs (including IDSM Pilots) and activities and by Q1 of 2011 will begin to identify opportunities and projects to target where there are integrated offerings and projects underway, and report best practices.

## Statewide Accomplishments:

The Statewide team developed a tracking template for integrated efforts, pilots, programs and activities, and presented template to Energy Division for review. The IOUs have begun tracking efforts, activities, projects and pilots to share lessons learned and best practices. Below is a description of some of the individual efforts and activities being tracked by the utilities.

## PG&E Accomplishments (Details provided in Excel Template):

- Integration Training
  - Integration Sales Training-
    - 2010 events held in 2 locations with 513 PG&E Program and Service & Sales participants that had a response that 82% had better understanding of IDSM offerings.
    - 2011 events currently in development
  - Integration Education and Training-
    - 10 Integrated classes completed to date for trade professionals /vendors /external partners
    - 18 events scheduled through the end of the year
- Integrated Pilots:
  - Zero Net Energy- currently have 4 Subprograms in development
  - Green Communities- Completed two statewide webinars; held the Statewide Energy Efficiency Best Practices Forum and Government Partnership Meeting; launched Beacon Award Program; Workshop contract signed 6 additional programs in various stages of development.
  - Innovator Pilots- 7 Projects with contracts out for signatures.
  - LIEE / MIDI- have an executed contract and are currently identifying customers to participate in MIDI as well as scheduling installations
- Integrated Efforts
  - SmartAC and LIEE – Using LIEE contractors to enroll customers in SmartAC
  - Sustainable San Francisco – Leveraging existing programs to reduce demand in parts of SF by 20 MW through DR and 20 MW through EE to avoid the need for new power plants – currently achieved close to 17 MW from EE and close to 19 MW from DR.
  - General CSI- Integrates EE with solar installations in order to maximize savings opportunities for customers – over 20,000 customers have participated since start of program through Q3 2010.
  - New Solar Homes Program- Intended to increase EE and solar in residential new construction – 897 homes have been completed since start of program through Q3 2010. - .
  - Multifamily Solar Homes Program- Goal is to incorporate high levels of energy efficiency and high performing solar systems to help enhance the overall quality of affordable housing -16 low income multifamily complexes have been completed through Q3.
  - Single Family Solar Homes Program- Provides low-income homes with access to solar systems to decrease electricity usage and bills without increasing monthly expenses – 128 low income single family homes have been completed through Q3.
  - Solar Water Heating Program- Provides rebates to customers who install eligible solar water heating systems in homes or businesses, requires EE audit – 30 systems have been installed through Q3.

- Integrated Projects
  - Tracking over 30 Integrated projects with individual customers
  - Projects are funded by individual programs (EE, DR, DG)
  - Identified the following Best Practices:
    1. Use a customer-based solution by:
      - a. Creating an Integrated energy plan with customer
      - b. Identifying solutions to match PG&E programs with the customers needs based on that plan
    2. Use Integrated audit to identify Integrated opportunities for the customer to implement
    3. Utilized integrated checklist of various programs and channels to create customer solution.
    4. Leverage Marketing collateral that focuses on customers segments with program information secondary as opposed to program focused material
    5. Create PG&E team approach with customer decision makers and corporate team
    6. Use team of vendors and PG&E program managers to leverage industry and product expertise for the customer

**SCE Accomplishments (Details provided in Excel Template):**

- Integrated Pilots
 

SCE has six specific integrated pilot programs that were identified in the Demand Response application and authorized in D.09-09-047 (EE programs decision) to develop operational integration practices for the development of pilot programs that will incorporate DR measures and concepts with the existing energy efficiency programs portfolio. The pilot programs approved for incremental funding were:

  - Non-Residential New Construction – integrated approach to leverage the existing delivery channels for energy efficiency in the commercial new construction market to promote DR design measures. This effort is underway, with primarily internal coordination efforts and identification of projects / pilots.
  - Residential New Construction – SCE is developing a market assessment to determine current technical potential of integrated new construction measures and a market assessment of integrated opportunities for homes and multi-family housing.
  - Institutional & Government Partnership Program – Focus is on developing an integrated approach to retrofitting and upgrading these facilities in this Third Party program. Fifteen initial buildings have been identified for detailed integrated on-site engineering audits focused specifically on this customer sector.
  - IDSM Food Processing Pilot – combines integrated auditing, resource efficiency labeling and continuous process improvements for meeting the goals of an integrated program delivery. The pilot is underway with the issuance of an RFP to identify a resource to deliver the program requirements.
  - WE&T Smart Students – designed to leverage SCE SW WE&T program across diverse learning environments to deliver EE, DR and renewable energy information via primary educational channels. The pilot is underway with plans to deliver curriculum to K – 6 schools in the Spring of 2011.
  - TRIO Program (Sub-program in Emerging Technologies) – This pilot effort to provide integrated customer solutions upstream of the retrofit markets is being coordinated through the Statewide ET efforts to identify and fast track integrated developmental opportunities.



In addition, other Statewide Plots are underway through the Energy Efficiency Application that are highlighted in the workbook:

- New Construction Efforts (SCE/BITA Demo house, SBD, Ca. Advanced Homes/NSHP) –all in progress
  - Sustainable Communities – in progress
  - Zero Net Energy – in progress as a part of the Sustainable Communities effort
  - IDSM Food Processing Pilot (See above)
  - Sustainable Portfolios – intended to achieve water, energy, waste and GHG reductions in commercial office space – currently being reevaluated base on the economy
- Integrated Efforts – all of these are in progress with audits underway:
    - EE for Entertainment Centers- Utilizes energy audits to indentify EE and DR opportunities in entertainment venues.
    - Commercial Utility Building Efficiency- Installs reliable and comprehensive energy efficiency technologies that achieve energy savings, demand reduction and associated pulled-through demand response in commercial buildings
    - Retail Energy Action Program- Provides services that increase energy efficiency and demand management in retail facilities.
    - Management affiliates Program- Employs a comprehensive approach by promoting retrofits and other IDSM alternatives.
    - Data Centers- Provides energy saving activities to data centers including virtualization software to reduce server load, retrocommissioning, HVAC/mechanical, and lighting load reduction.
    - Monitoring Based Persistence Commissioning Program- Provides marketing, technical assistance, and financial incentives to customers for the implementation of traditional retrocommissioning (RCx) measures.
    - Private Schools and Colleges Program-feature energy audits covering energy efficiency and demand response.

#### **SDG&E/SoCalGas (Details provided in Excel Template):**

- IDSM Pilots:  
SDG&E is continuing development of its Sustainable Communities and Microgrid Pilot programs. The Microgrid Pilot will be deploying the Whole House Performance and Prescriptive programs and its Summer Saver program.
- SoCalGas/SCE Coordination Efforts:  
SoCalGas and SCE continue to work together to provide coordinated programs to its common gas & electric customers. In addition, SoCalGas continues to work with other POU's in its territory to offer comprehensive gas and electric EE programs whenever possible. SoCalGas also continues to work with its water utilities to promote EE/water conservation opportunities.

#### **Next Steps and Timing:**

- A. Continue tracking efforts, projects, pilots, etc.
- B. Begin identifying best practices

**6. Develop regular reports on IDSM progress and recommendations to the Commission.**

**Strategy:**

The Task Force will develop a communications strategy that will include regular meetings, reports, following an agreed upon template, on efforts to provide the tracking activities and plans going forward to the ED.

**Statewide Accomplishments:**

The Task Force, including the Energy Division, has met during regulatory scheduled conference calls and has held 1 in person meeting on August 26, 2010 to discuss progress on integrated activities. The IOUs provided a quarterly written report including updates on the eight IDSM activities to CPUC for Q2 2010 in July 2010.

**Next Steps and Timing:**

- A. Conference calls are scheduled biweekly through Q4.
- B. Next in-person meeting scheduled for November 18 in San Francisco.
- C. Provide next Quarterly Report on January 31, 2011

**7. Organize and oversee internal utility IDSM strategies by establishing internal Integration Teams with staff from EE, DR, DG, marketing, and delivery channels.**

**Strategy:**

The IOUs will set up internal Integration teams that meet at least monthly with IOU staff from EE, DR, DG, LIEE, Marketing and Delivery channels such as Service and Sales (account reps.) and Third Party / Government Partnerships.

**Statewide Accomplishments:**

The internal utilities teams, in coordination with the IDSM SW Team continue to refine the reporting and tracking framework that will describe the IDSM program design and intent in line with the statewide strategy, identify goals and metrics to accomplish the tasks for each of the pilot programs, assess the current activities and track their real time progress towards the goals, and report out the energy savings, best practices and lessons learned, and integration best practices.

- A. Continued regular internal Integration team meeting with staff from EE, DR, DG, LIEE, Marketing, Service and Sales and Third Party / Government Partnerships.
- B. Collected information related to the other seven tasks
- C. Developed regular internal integration reports that were used for the quarterly reports to the CPUC.
- D. Developed integrated tracking report to monitor and report activities and establish best practices.
- E. Established sub-program meetings to follow up on and monitor integrated activities.
- F. Held biweekly SW meetings / phone calls with other utilities to coordinate

**Next Steps and Timing:**

- A. Continue regular meetings
- B. Coordinate with SW team as best practices and other issues of importance are realized from internal meetings
- C. Begin identifying and documenting best practices

8. **Provide feedback and recommendations for the IOUs integrated marketing campaigns including how the working group will ensure that demand response marketing programs approved as category 9 programs are coordinated with energy efficiency integrated marketing efforts.**

**Strategy:**

Task Force to work with the larger Statewide ME&O effort to ensure integrated messaging and coordination at a statewide level.

Task Force to conduct internal review of marketing efforts where there are opportunities to integrate messages and campaigns.

**Statewide Accomplishments:**

The individual IOUs coordinated on integration of Statewide marketing branding and messaging. The SW ME&O Integrated Task Force meets regularly for weekly status meetings including Tuesdays: status call with agencies (Ascentium, Interbrand and DraftFCB), Wednesdays: status call re: web portal and Thursdays: status calls with IOUs, agencies and CPUC. There have been several IOU, agencies and CPUC team meetings led by DraftFCB as they begin to develop and share their strategic direction for the launch of the brand. These specific meetings took place on July 28, September 1 and 17.

- A. Statewide Brand Update – Formally announced the launch of Engage 360 brand at the CPUC meeting on Oct. 14 with a press release and FAQs.
- B. Web Portal Update – The Engage 360 web portal went live with the formal announcement of the Statewide brand at the CPUC meeting on Oct. 14. ([www.engage360.com](http://www.engage360.com))
- C. LIEE Brand Update – Formally announced the new brand, Energy Savings Assistance Program at the CPUC meeting on Oct. 14 with a press release and FAQs.

**PG&E Accomplishments:**

**Residential**

- Developed an Integrated Residential Marketing Plan
  - High level view of customer
  - Coordinated tactics and delivery schedule
  - Reduced use of individual campaigns
  - Cohesive plan and coordinated campaigns
- Best Practices:
  - Leveraged cross selling from one program to another. Often if customers participate in one program, they are more likely to participate in another
  - Cross-mentioned other programs wherever practical
- Issues / Challenges
  - Multiple proceedings with associated goals and specific timing creates potential for overwhelming customers with information
  - Beginning to research how bundling certain programs together may or may not increase program uptake

A. Campaigns:

- Launched integrated marketing campaigns for Residential markets including
  - SmartMeter messaging regarding EE, DR and LIEE solutions
  - Summer Savings Campaign
  - Fall Savings Campaign
  - LIEE brochures including Residential EE and DR information

B. Collateral:

- Developed and sent collateral to customers / participants to support campaigns
- Leveraged cross selling from program to another

C. Web:

- Website Integration of programs including the following links:
  - <http://www.pge.com/financialassistance/>
  - <http://www.pge.com/myhome/saveenergymoney/rebates/index.shtml>
  - <http://www.pge.com/myhome/saveenergymoney/energysavingprograms/index.shtml>

## Business

A. Collateral

- Created an Integrated Marketing folder with interchangeable segment specific inserts.
- Identified and developed over 10 integrated case studies highlighting projects and the customers effort in each customer segments including but not limited to:
- Developed integrated fact sheets with information on integrated offerings to over 15 segments
- Developed Bundled Segment Toolkits for 9 segments. The toolkits feature a one-click ordering procedure, and include up to 10 pieces of segment-specific collateral bundled in with the Integrated Folder.

B. Web

- Web site at [www.pge.com/businesssolutions](http://www.pge.com/businesssolutions) features 13 segment-specific pages with integrated content, including EE rebates & incentives/SBD, DR, Solar, ClimateSmart, CEI, Benchmarking, Audits, Training, Fact Sheets, Case Studies and other Resources. This site is intended to be a one-stop shop for energy management solutions targeting Commercial, Industrial and Agricultural businesses.
- The Demand response Flash animation was expanded to include a new customer testimonial video on The Fairmont Hotel, San Jose. This video included their DR and EE participation efforts. This can be viewed from the My Business Demand Response landing page ([www.pge.com/demandresponse](http://www.pge.com/demandresponse)).
- Web site at [www.pge.com/educationalresources](http://www.pge.com/educationalresources) features educational programs and curriculum for teachers, information and activities for students by grade level, and resources for PTAs. The site provides a search tool for teachers to find curriculum from Energenius, Safe Kids, PEAK (DR), Solar Schools, and various other curriculum programs provided by PG&E.

C. Training

- Conducted 15 Workshops that cover “Next Steps After Benchmarking,” including how to use the benchmarking tool to measure energy use improvements, and how to improve Energy Star scores with EE rebate and incentive measures. Feedback forms capture for which of the integrated programs business customers are interested in

receiving more information, and these leads are provided to PG&E representatives for customer follow-up.

## **SCE Accomplishments:**

### **Residential**

#### **A. Campaigns**

- Summer Solutions Campaign featured the Home Energy Efficiency Survey program, and also supported the Appliance Recycling Program, Refrigerator Rebate, Pool Pump Rebate and Evaporative Cooler as secondary messages. The campaign offered SCE customers with relevant small-to-large energy-savings solutions
- Continued the Economic Assistance campaign, which integrated Energy Efficiency solutions with income qualified programs like CARE and the Energy Management Assistance (EMA) program.
- Animated educational video vignettes, featuring programs like Home Energy Efficiency Surveys and Save Power Days, TOU and Energy Vampires, are available in both English and Spanish produced and posted on the video sharing network YouTube.com.
- Direct to consumer communications integrated Energy Efficiency programs, like Appliance Recycling, Home Energy Survey and Home Energy Rebate programs to one holistic solution.
- Participated in LA County Fair September 4 – October 3, providing customers with information on Energy Efficiency, Solar, CARE/FERA, and Energy Management Assistance for income qualified customers.

#### **B. Collateral**

- Developed the 2010 Residential Savings Guide, which featured information on Home Energy Efficiency Rebates, Home Energy Efficiency Surveys, CARE and FERA, Energy Management Assistance, California Solar Initiative, and a demand response message.
- Launched messaging for residential communications integrating Energy Efficiency and Solar messaging:
  - 2010 Residential Energy Guide
  - Welcome Kit
  - Mobile Energy Unit
- Future Efforts of integrated Energy Efficiency, Demand Response and Solar messaging materials scheduled for future release:
  - Eight individual customer statement inserts containing district specific logic and information to launch October 2010.
  - Smart Connect Welcome Kit initial launch January 2011 (limited release to Edison Smart Connect customers)
  - Program Inserts due for Q4 release.
  - Seasonal Campaigns scheduled for Spring 2011
  - Residential Savings Guide 2011
  - Hybrid Mobile Energy Unit updated with revised program messaging and expanding to include Energy Upgrade California by the end of Q4

#### **C. Web**

- Summer Solutions campaign encouraged customers to take the Home Energy Efficiency Survey to receive customized DSM recommendations on ways to reduce energy savings around their home.
- Be an Outlet for Change microsite where customers can make a commitment to energy-efficient behaviors.



## Business

### A. Collateral

- Energy Efficiency, Demand Response and Solar messaging integrated into six segmented Energy Management Solutions Guides offering industry specific saving opportunities for the business customer in the following segments:
  - Agriculture & Food Processing
  - Government & Institutions
  - Manufacturing & Warehousing
  - Office
  - Retail
  - Water & Wastewater
- Provide integrated Welcome Kit:
  - Large Business integrated Energy Efficiency, Demand Response and Solar messaging.
  - Small Business integrated Energy Efficiency and Solar messaging.

### B. Web

- Webpage ([www.sce.com/solutions](http://www.sce.com/solutions)) is a business resource that includes integrated messaging, Solutions Guides for download in addition to the following online tools:
  - Online application tool
  - Customized calculation tool

## SDG&E/SoCalGas Accomplishments:

### A. Campaigns

- Launched an integrated marketing campaign for Residential customers that includes information on energy efficiency and demand response programs. Campaign website can be found at [www.sdge.com/saveenergy](http://www.sdge.com/saveenergy)
- Launched a campaign targeted for Low Income customers that promotes LIEE, CARE and energy-efficiency. Campaign website can be found at [www.sdge.com/assistance](http://www.sdge.com/assistance)
- “Summer prep” campaign targeted to Residential customers included information on energy efficiency and demand response programs. Campaign website can be found at [www.sdge.com/summer](http://www.sdge.com/summer)
- Launched a direct response (direct mail / e-mail) campaign to Small/Medium Business customers that integrates energy efficiency and demand response program offerings

### B. Collateral

- Collateral for Commercial/Industrial customers has been completely revamped to use a segmented marketing approach. Each customer segment has a set of specific program information presented to them, which includes integrated messaging on Energy Efficiency and Demand Response. Segments include:
  - Wholesale/Retail/Offices (5 subsegments)
  - Government/Utilities (5 subsegments)
  - Hospitality/Services (3 subsegments)
  - Manufacturing (3 subsegments)
  - Institutional (3 subsegments)
  - Agriculture/Construction (2 subsegments)

- Collateral for Residential programs includes messaging on available low income programs; collateral for Energy Team (LIEE) includes messaging on the importance of low-cost, no-cost energy efficiency tips and general conservation efforts.

#### C. Web

- The “Business” pages of our website have been restructured to follow the segmented marketing approach. Each customer segment (manufacturing, education, retail, etc.) has a set of specific program information presented to them, including the above mentioned collateral, which includes integrated messaging on Energy Efficiency and Demand Response.
- Campaign landing pages for all integrated marketing efforts in section “A. Campaigns” have been developed to showcase all programs available to both residential and business customers, including messaging on energy efficiency, demand response and low income programs.

#### D. Training

- Various vendor workshops have been conducted to promote these portfolio services. Presentation materials are available on SDG&E’s website.  
[www.sdge.com/business/rebatesincentives/tradeprofessionals/presentations.shtml](http://www.sdge.com/business/rebatesincentives/tradeprofessionals/presentations.shtml)
- Its Education and Training workshops presents opportunities for presenting integrated energy management, e.g., its kWickview Online Energy Management Tool.

#### **Next Steps and Timing:**

- A. Continue integrated marketing efforts
- B. Track efforts and successes from integrated approaches
- C. Begin identifying best practices