

**Joint IOU Integrated Demand Side Management  
Compliance Tracking Report  
4<sup>th</sup> Quarter 2010**

This report is provided in compliance with CPUC Energy Efficiency (EE) Decision 09-09-047, which directed the Investor Owned Utilities (IOUs) to establish a Statewide Integrated Task Force and to file a joint advice letter that included a detailed explanation of tasks, timelines, and role of the utility task force in addressing the eight integration tasks described in the EE decision. The Joint IOU Advice Letters of SDG&E 2139-E-B/1921-G-B, SoCalGas 4066-B, SCE 2426-E-B and PG&E's 3079-G-B/3595-E-B, 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.

The IDSM Task Force and individual IOUs will launch 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.

**4<sup>th</sup> Quarter Statewide Accomplishments:**

- A. Interviews were held and completed, status calls were made as follow up.
- B. Summary of initial findings was issued.
- C. Meeting to discuss initial findings was held on December 9<sup>th</sup>.
- D. Draft white paper was distributed for review with a redraft due in January 2011.

**Next Steps and Timing:**

- A. January 2011 – Circulate redraft of white paper to IDSM Task Force
- B. First Quarter 2011 - 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 will 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.

**4<sup>th</sup> Quarter Statewide Accomplishments:**

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

**Next Steps and Timing:**

- A. Discuss timing and plan at February IDSM Task Force meeting

**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.

**4<sup>th</sup> Quarter Statewide Accomplishments:**

- A. Held monthly statewide collaboration/coordination conference call
- B. Included Emerging Technologies (ET) in Integrated Tracking Process
- C. Promoted ET Incubation Efforts through the ETCC Open Forum. One ETCC Open Forum was held this quarter on October 5 in San Francisco with presentations from, EE, DR, DG, and storage companies.
- D. Sponsored and coordinated ET Summit held on November 7-9 at the Sacramento Convention Center. The ET Summit gave end users an opportunity to explore promising new technologies and learn about key policy considerations at the local, state and national levels. Presentations included the latest innovations on EE, DR, and renewables.
- E. Held Emerging Technologies Coordinating Council meeting on December 7 in Pomona. Discussed EE and DR efforts.
- F. Identified integrated emerging technologies to track (see Table 1)

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 the water utilities SCADA system, allowing them to monitor and control for energy efficiency in real-time	PG&E and SCE	Completed – Report Posted on ETCC website <a href="#">SJWC Report</a> <a href="#">EBMUD Report</a>
Heat Pump Water Heaters	Water heaters with EE and DR capability	PG&E	Completed – Report Posted on the ETCC Website <a href="#">HPWH Report</a>
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	Project Complete. Reviewing Report for Technology Transfer
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	Five Installations Complete. Remaining Installations in Q1 using Updated Technology
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	Project Complete. Reviewing Report for Technology Transfer

Lumetric Lighting Technology	New electronic high intensity discharge (e-HID) lighting technology called the SmartPOD™. The fixtures used will be IP addressable, enabling use in Demand Response strategies.	SDG&E	Field test sites have been selected and project should begin installation in Q1 2011
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**Next Steps:**

- A. Continue identifying and tracking integrated Emerging Technologies
- B. Statewide ET team is researching the feasibility of incorporating DSM modifiers into the ETP Database. Working closely with Statewide 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 ED will be used for tracking ET projects. The Statewide ETP managers are exploring the possibility of adding fields to the database that would identify IDSM prospective technologies.
- C. The IDSM Task Force will collaborate with the Statewide 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. The IOUs are also enhancing existing tools to include solar requirements.

The IOUs are continuing to offer onsite integrated audits to medium and large customers.

**Online Tool 4<sup>th</sup> Quarter Statewide Accomplishments:**

- A. The IOUs are coordinating on a Statewide basis to deliver an integrated audit tool with consistent business requirements
  - a. PG&E continues to work with their vendor to ensure the audit tools meets the CPUC business requirements
  - b. SCE and Sempra are conducting an RFP process (see Table 2 for schedule)
    - i. RFP was distributed for internal signatures.
    - ii. Scoring occurred in mid-December.
    - iii. Bidders' conference took place on November 15<sup>th</sup> for SCE comments.
- B. The IOUs are investigating incorporation of a solar calculator with existing tools.

**Table 2 – SCE/Sempra Online Tool Timeline**

<b>Key Event (Phase 1)</b>	<b>Key Date</b>
RFP Released	11/9/2010
Bidders Optional Conference (Webinar)	11/15/2010, 9:00a.m to 11:00 a.m. (PST)
Questions Due from Bidders'	11/18/2010, 2:00 p.m.(PST)
Answers to Bidders' Questions Provided on PEPMA	12/2/2010
Bidder Proposal Due- Phase 1	12/16/2010, 2:00 p.m.(PST)
Non-selected Bidders Notified	2/01/2011
Finalist Bidders Notified to advance to Phase 2 "Presentation"	2/01/2011
<b>Key Event (Phase 2)</b>	<b>Key Date</b>
Bidders notified of Phase 2 Presentation Requirements and Presentation Schedule	2/01/2011
Pre-Presentation Questions Due from Bidders'	2/03/2011, 2:00 p.m.(PST)
Answers to Bidders' Presentation Questions Provided on PEPMA	2/07/2011
Bidders' Presentation	2/14/2011 to 2/18/2011
Evaluation, Scoring, and Selection of Presentations Completed	2/11/2011
SCE Procurement to Notify Bidders "Selected Subject to Negotiations"	2/15/2011
Purchase Order Issued (As Early As)	3/16/2011 to 3/21/2011

NOTE: \* Highlighted dates have been revised.

**Onsite Audit Updates**

The IOUs are offering onsite integrated audits to large customers.

PG&E currently tracks large integrated onsite audits for customers over 500 kW. Below is information for Large onsite Integrated Audits (LIA) conducted and planned in 2010 and first quarter of 2011.

	PG&E 2010 Integrated Audits Completed			Pending 1st Qtr 2011	
	LIA	Not LIA	Qtr Total	LIA	Not LIA
1Q	19	13	32	12	0
2Q	8	18	26		
3Q	9	13	22		
4Q	10	0	10		
<b>Year Total</b>	<b>46</b>	<b>44</b>	<b>90</b>	<b>12</b>	<b>0</b>

**Next Steps and Timing:**

- A. PG&E is coordinating development of a solar calculator for the interim enhancement with Beta testing and roll out expected in Q1 2011
- B. The Integrated audit tool under development by IOUs will meet the timing and business requirements of the 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.

**4<sup>th</sup> Quarter Statewide Accomplishments:**

The Statewide team developed a tracking template for integrated efforts, pilots, programs and activities, and presented the 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. More details are provided in the tracking spreadsheet.

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

- Integration Training
  - Integration Sales Training- PG&E is working with internal Energy Service and Sales staff in coordination with the Marketing and Product teams to train staff on how to approach customers with integrated offerings.
    - 2011 events currently in development, meeting regularly to create agenda, coordinate format, dates and locations
    - Integration Award submissions have been compiled for recognition at the 2011 Regional event.
  - Integration Education and Training-
    - Through Trade Professional Channels - 8 half day events were held through the end of the year
      - Over 200 participants came to the events including PG&E reps and the Trade Pro vendors
      - Surveys were collected at the end of the events for satisfaction and feedback tracking
    - In 2010 PG&E added an Integration track to it's external training efforts ant the ETC and the PEC.
      - Focused on integration of programs and systems.
      - PG&E has offered 13 class topics offered multiple times a year in 2010
      - PEC will be offering 10 individual classes in 2011
      - ETC will be offering 5 different classes, for a total of 14 sessions in 2011
      - Dates and descriptions can be viewed at [www.pge.com/energyclasses](http://www.pge.com/energyclasses)
- Integrated Pilots
  - Zero Net Energy- all subprograms are all moving forward since being approved.
  - Green Communities- held first Statewide Energy Efficiency Best Practices Forum and Government Partnership Meeting.
  - Innovator Pilots- Two more contracts were signed leaving 3 still under negotiation.
  - LIEE / MIDI- currently implementing contracts with local LIEE providers who will deliver MIDI services.
- Integrated Efforts
  - SmartAC and LIEE – Using LIEE contractors to enroll customers in SmartAC- There was a major multi-family enrollment at year-end for Davis & Stockton. The LIEE and CARE potential are still being explored.
  - Sustainable San Francisco – Achieved reduction of 1,861 kW and 10,061,754 kWh through fourth Quarter.
  - General CSI- customers required to complete an enhanced EE audit to identify cost effective EE measures to participate- 1,887 residential and 64 non-residential participants.
  - New Solar Homes Program- Intended to increase EE and solar in residential new construction – 83 participants.



- 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- 4 participants.
- Single Family Solar Homes Program- Provides low-income homes with access to solar systems to decrease electricity usage and bills without increasing monthly expenses – 39 participants.
- Solar Water Heating Program- Provides rebates to customers who install eligible solar water heating systems in homes or businesses, requires EE audit – 32 residential and 5 commercial/ multi-family participants.
- Integrated Projects
  - Continued to track over 30 Integrated projects with individual customers
  - Projects are funded by individual programs (EE, DR, DG)
  - Added additional projects to track in Q4 through offering the Integrated Awards program.
    - 6 projects were submitted in Q4 for consideration
  - Continued to identify Best Practices as follows:
    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 that includes the appropriate subject matter experts at PG&E along with customer decision makers and corporate representatives as appropriate.
    6. Use team of vendors and PG&E program managers to leverage industry and product expertise for the customer.
    7. Include appropriate Third Party providers early in the Energy Management process to plan projects to complement PG&E offered programs.

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

**Integrated Pilots**

Statewide Pilots are underway through the Energy Efficiency Application that are highlighted in the excel workbook:

- New Construction Efforts (SCE/BITA Demo house, SBD, CA Advanced Homes Program (CAHP/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 – RFP Underway
- Sustainable Portfolios – intended to achieve water, energy, waste and GHG reductions in commercial office space – currently being reevaluated based on the economy

In addition, SCE is pursuing a Water EE Pilot:

- Operational Energy Efficiency Pilot (OEEP) - The "Water- Energy Efficiency Nexus" is being investigated through a series of water and energy IOU pilots aimed at: 1) determining energy savings embedded in water conservation, and, 2) direct savings from optimized water pumping equipment. D.07-12-050 approved pilot water conservation programs within the energy utilities' energy efficiency programs, also known as "embedded energy efficiency." A later Decision on a PFM (filed by the California Water Association) approves funding for pilot to investigate the opportunities for direct energy savings from potential improvements in wire-to-water operational efficiency through the optimization of induction motors, pumps, variable frequency drives and Supervisory Control and Data Acquisition (SCADA) systems. EM&V protocol for both pilots is currently underway. Current activity includes:
  - a. EM&V consultant selected for Water Pilot. Consultant to be managed by DWA.
  - b. Four Advice Letters filed by Water IOUs requested CPUC approval to use OEEP memo accounts to fund In-conduit Hydro electric projects. December 2 resolution correctly placed the advice letters outside of the EE proceeding. Energy IOUs should engage with Division of Water to develop EM&V procedure for projects.
  - c. DWA site visit at East Pasadena WC. DWA requesting visit to discuss EM&V preliminary results and next steps.
- Integrated DR / EE 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. These pilot programs are updated in the Excel Attachment.
- Integrated Efforts – all of these are in progress with audits underway:
  - EE for Entertainment Centers- Utilizes energy audits to identify 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.

- **Best Practices**  
Since most of the pilots are in the early stages, there are currently no best practices to report. However, SCE will be tracking the pilots and identifying best practices

**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.

**Sustainable Communities:**

New Construction is coordinating with other departments within SDG&E (eg. Emerging Technologies, Clean Energy Systems, and Electric Operations). Because there has been a lack of activity with the RMV program, SDG&E SCP will look for other opportunities within the service territory to work with developers in charting a roadmap to building a sustainable community.

**Microgrid Nonresidential – SDG&E Only**

The Program kick off to the commercial/industrial (non-residential) customers of Borrego Springs is under development, and an initial meeting with community leaders has taken place to introduce the different aspects of the program. SDG&E had a presence at the Borrego Days event on October 30, 2010. Contract is in place with Matrix Energy Services for the non-residential portion of this program.

**Microgrid Residential – SDG&E Only**

Synergy was the only company of 4 to respond to and RFQ for the services provided to residential portion of the program. Contract negotiations are in progress. A Borrego Energy Day event is being tentatively planned for April 9, 2011.

- **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:**

- Continue tracking efforts, projects, pilots, etc.
- SCE and Sempra are developing internal integration training with Account Services staff in coordination with the Marketing and Program teams to train staff on integrated programs and how to approach customers with integrated offerings.
- Begin identifying best practices
  - The IOUs will track the pilots and identify best practices that can be replicated within other projects and with the utilities Statewide.
  - Currently there are no statewide best practices to report.

**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.

**4<sup>th</sup> Quarter Statewide Accomplishments:**

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

**Next Steps and Timing:**

- A. Conference calls are scheduled biweekly through the Quarter.
- B. Hold IDSM Task Force Meeting in February 2011.
- C. Provide next Quarterly Report on April 30, 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.

**4<sup>th</sup> Quarter Statewide Accomplishments:**

The internal utilities teams, in coordination with the IDSM statewide 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 7 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 statewide meetings / phone calls with other utilities to coordinate

**Next Steps and Timing:**

- A. Continue regular meetings
- B. Coordinate with statewide 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:**

The Task Force will 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.

**4<sup>th</sup> Quarter Statewide Accomplishments:**

The individual IOUs coordinated on integration of statewide marketing branding and messaging. The statewide ME&O Integrated Task Force meets regularly for weekly status meetings including Tuesdays: status call with agencies (Ascentium, Interbrand and DraftFCB) and CPUC, and Thursdays: status calls with IOUs. There are also ongoing IOU, agencies and CPUC team meetings led by DraftFCB as they continue to develop and share their strategic direction for the launch of the brand.

- 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.
- D. Worked on SBD logo development with IOUs.

**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 the following:
  - SmartMeter messaging regarding EE, DR and LIEE solutions
  - Fall Savings Campaign extended its Search Engine Marketing through November 30, 2010
  - Winter Gas Savings
  - LIEE brochures including Residential EE and DR information
  - SmartAC installed base newsletter including SmartMeter and EE 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/seasonalsavings>
  - <http://www.pge.com/solar>

**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.
  - Created program videos for DR and SMB
  - Developed and sent new integrated collateral to customers for education and to support workshop effort.

B. Planning:

- Strategic Marketing plan for each segment developed and completed in Q4 for 2011 execution.

C. Training

- Conducted 18 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.

D. 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.

E. Workshop:

- Hospital Gas Curtailment lunch and learn event took place in December, 3 more are planned for 2011
- Participated in expo show casing PG&E marketing collateral to interested customers along with the other IOUs.

**SCE Accomplishments:**

**Residential**

A. Campaigns and Communications

- Economic Assistance Campaign (public relations, direct mail, web, radio, door to door) integrated Energy Efficiency solutions with income qualified programs like CARE and the Energy Management Assistance program
- Continued to send Welcome Kit direct mailer promoting Energy Efficiency, and Solar Messaging to residential customers, who Turn on or Transfer service within SCE's territory
- Circuit Savers direct mailer incorporated demand response messaging with energy efficiency tips
- Seasonal Campaigns scheduled for Spring 2011

B. Outreach and Events

- Continued information outreach through our Mobile Energy Unit, (EE, Solar, LIEE/CARE/EMA, and DR)
- Hybrid Mobile Energy Unit updated with revised program messaging and expanding to include Energy Upgrade California by the end of Q4
- Participated in/hosted 28 outreach events providing both residential and/or business customers with information on EE, DR, Solar, and Income Qualified programs, including events like the 2010 Solar Power International Conference and the LA County Fair

C. Collateral and Support Materials

- Residential Savings Guide and Residential Energy Guide providing integrated EE and DR messaging were available for distribution to customers through the call center and at events

D. Web

- Continued YouTube campaign promoting HEES, Save Power Days, TOU, and Energy Vampires

**Business**

A. Campaigns and Communications

- Continued to send Welcome Kit direct mailer promoting Energy Efficiency, Demand Response and Solar Messaging to business customers
- Continued to send Power Bulletin newsletter, which provides integrated EE and DR messaging

B. Outreach and Events

- Participated in/hosted 28 outreach events providing both residential and/or business customers with information on EE, DR, Solar, and Income Qualified programs, including events like the 2010 Solar Power International Conference and the LA County Fair

C. Collateral and Support Materials

- Case Studies highlighting EE, DR, and pump testing
- Energy Management Solutions Guides provided EE, DR and Solar messaging solutions by segment (available in 6 industry segments)

**SDG&E/SoCalGas Accomplishments:**

A. Campaigns

- Continued to run integrated marketing campaign for Residential customers that includes information on energy efficiency and demand response programs. Paid communications tactics ran through the end of October 2010. Campaign website can be found at [www.sdge.com/saveenergy](http://www.sdge.com/saveenergy)
- Continued the 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)
- Launched phase 2 of a direct response (direct mail / e-mail) campaign to 55,000 Small/Medium Business customers that integrates energy efficiency and demand response program offerings
- SCG launched Q4 Quarterly Newsletter and Monthly Onserts available to all customers in their monthly bill, including energy efficiency programs and customer assistance.

B. Collateral

- Completed a new Residential Programs & Services brochure that contains information on EE, DR and low income programs
- SCG continues to distribute brochures that include all residential programs in a concise, easy to read format (Guide to Savings, Services, and Safety and Home Energy Guide)

C. Web



- 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.
- SCG added reference to customer assistance programs on all Res EE web pages on socialgas.com
- Comprehensive HEES results (online and mail-in) pertinent to various services available to residential customers, including energy efficiency programs and customer assistance.

#### D. Training

- Vendor workshops conducted to promote these portfolio services. Presentation materials available on SDG&E's website:  
<http://www.sdge.com/business/rebatesincentives/tradeprofessionals/presentations.shtml>
- Education and Training workshops present opportunities for presenting integrated energy management, e.g., its kWickview Online Energy Management Tool.:  
<http://www.sdge.com/business/rebatesincentives/tradeprofessionals/presentations.shtml>

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

- A. Continue integrated marketing efforts
- B. Track efforts and successes from integrated approaches
- C. Begin identifying best practices through inter-utility meetings and discussions to share best practices and lessons learned