



## Working Agenda

<b>Monday, May 6, 2019</b>	
8 AM - 3:30 PM	<b>Pre-conference Training Course</b> (Extra Fee) - Introduction to the Principles of Demand-side Management
3:45 – 4:45 PM	<p><b>UtilitiesConnect – Utilities Only Session for attendees who work for a utility.</b></p> <p><b>Breaking down silos and building an experience</b></p> <p>Energy Efficiency programs are complex to say the least. They consist of an extraordinary number of parts and pieces which must all be aligned to flow smoothly and effectively. One often disjointed element is the customer experience and overall customer communication around programs. On a good day, customers struggle to understand the complex world of energy efficiency. Add in siloed departments to the internal structure of a program and you can easily place the customer experience at significant risk. Participate in this workshop to learn how different teams view and communicate program benefits to customers and how to tear down the silos to create a seamless customer experience.</p>
3:45 – 4:45 PM	<p><b>Professional Development Session - PSA. Calling All Vendors. RFP Response Do's and Don'ts.</b>  <b>Moderator:</b> John Hargrove, AESP</p> <p>Get to Renton early to participate in this engaging session that was on the Annual Conference agenda and is back by popular demand!</p> <p>If you do business in this industry you have probably had some exposure to a Request for Proposal (RFP). RFPs are the primary method for utilities to procure products and services from vendors. But for most vendors, the win rate is pretty low. Hear directly from utilities on how you can be more successful in your responses. Hear the do's and don'ts, best practices and lessons learned. Walk away with insights on how utilities really think.</p>

5 – 5:30 PM	<b>New Professionals Meeting</b>
5:30 – 7 PM	<b>Opening Reception – Expo Hall</b>

**Tuesday, May 7, 2019**

7 AM – 6 PM	<b>Registration Desk Open</b>
7:15 – 8:15 AM	<b>Networking Continental Breakfast - Expo Hall</b>
8:15 – 8:45 AM	<p><b>Opening Keynote Plenary - LIVE VIA SKYPE</b></p> <p>Alex Sheen, Founder because I said I would</p> <p>We live in a society that often does not respect the importance of a promise. It is too easy to say "I'll get to it" or "tomorrow." In many ways we have become numb to disappointment and broken commitments. This expectation starts to fade into our character as individuals. Alex Sheen believes that every individual has the strength to become a person of their word.</p> <p>As the founder of an international social movement, Alex shares his insights and actionable ways to become better at fulfilling commitments. He inspires others to become more accountable to their promises through compelling and real-life examples from the "Because I said I would" movement. Alex convincingly illustrates how integrity and keeping your promises are forever interwoven.</p> <p>He discusses how holding ourselves and each other accountable truly changes humanity for the better. His charitable projects and awareness campaigns have been featured on ABC World News with Diane Sawyer, CNN, The Today Show, NPR, The Los Angeles Times and many other programs.</p>

Session 1	Program Design and Technology	Marketing	Evaluation
9:00 – 10:15 AM	<b>Moderator/Speaker:</b> Sarah Colvin, ecobee <i>“New” Story Slam Intro - The Christmas Eve</i>	<i>What Can the Supply Side Teach Us About Market Engagement?</i>	<i>TRC, SCT, UCT, PCT, RIM, and RVT.... Alphabet Soup?</i>

**Hostage**

*Spend 5 minutes and enjoy how one energy professional inadvertently got into the biz!*

I got my start in the energy sector through a sneaky little maneuver. I thought I was just getting an all-expense paid trip to Vancouver...but instead I got a career. In my post-university world, I was living the dream. Driving all over Ontario doing home energy audits. Until that one fateful call...my last energy audit of the day, Christmas Eve to be exact. When...POOF...I blew out the pilot light on the water heater and was held hostage in the homeowner's basement.

**Designing Programs Around IoT Technology**

**Speaker:** Wesley Whited, DNV GL

Many utility C&I programs are required to do more with less, which requires decision makers to seek innovative solutions that allocate resources in a way that streamline internal operations. In this presentation you will understand how offering a combined incentive helps utilities gain internal efficiencies from lower project management and administrative costs. Learn how integrating EE and DR at the device level simplifies outreach efforts and allows the energy advisor to open small- and medium-sized businesses. Through a live demonstration, you'll see the types of building loads that are energy efficient and demand responsive, and the utility-specific protocols used to automate device

**Moderator:** William Walker, Energy Solutions

**Speakers:** Daniel Ritter, Rexel USA; Francois Lebrasseur, A.O. Smith Corp; Stacey Turek, Vulcan – ITW Cooking Equipment and Brian Meneghan, Carrier Corporation

2018 in summary: Manufacturing volume is up, the commercial-industrial distribution channel is rapidly consolidating, and the Eagles won the Super Bowl. This 360-Panel will break it all down and provide you with fresh insights from manufacturers and distributors representing residential, commercial and industrial products. Learn how these market actors engage their customers, and where and how they plan to grow their business in the coming years. Expect a high-level of panelist interaction and hear how to: 1. Better align with the market to improve channel and customer experience; 2. Understand the impact of an expanding manufacturer side, a consolidating distribution channel and how they can utilize both to accelerate their objectives in the market; and 3. Glean best practices in program design and participation when considering the supply side.

**Speaker:** M. Sami Khawaja, Cadmus

Cost Benefit Tests have the power to make or break a program. If TRC, SCT, UCT, PCT, RIM and RVT just look like alphabet soup to you – then this is the session for you. This hands-on workshop targeting implementers, marketers and business developers, or evaluators who want to get back to basics, will explain the different tests, the inputs, and how to run the tests. You will also understand how different inputs affect cost effectiveness. Be prepared to do some math and have a few aha moments.

	<p>curtailment.</p> <p><b><i>AI-powered Disaggregation: Practical Applications for Intelligent Utility Decision Making for EV Growth</i></b></p> <p><b>Speakers:</b> Colin Gibbs, Bidgely and Jamie Dunckley, EPRI</p> <p>Load disaggregation is creating new value from utility investments in advanced metering, customer data and data analytics. Leveraging advancements in artificial intelligence and machine learning, disaggregation has become widely adopted as a solution for modernizing and personalizing utility programs. EV growth merits a direct application of this technology, as it presents both great opportunity for utilities, as well as a potential threat if mismanaged. Hear compelling research by EPRI, which dives into actual consumer EV behavior, informing what the electrification of transportation means for utilities now and in the future. Explore the opportunities for extending load disaggregation across key utility functions - grid modernization, load forecasting, DSM program optimization and electrification.</p>		
10:15 – 10:45 AM	<b>Networking Break - Expo Hall</b>		
<b>Session 2</b>	<b>Data and Analytics</b>	<b>Electric Vehicles</b>	<b>Marketing</b>
10:45 AM - Noon	<p><b>Moderator:</b> Laura Schauer, Illume Advising</p> <p><b><i>Using Data Analytics To Uncover Hidden</i></b></p>	<p><b><i>EVs as a Resource: All I need to know about electric vehicles and how to accelerate their adoption</i></b></p>	<p><b><i>Smooth Sailing to Savings: Using a sales funnel approach to engage hard to reach C&amp;I customers</i></b></p>

**Opportunities - “Let the data do the talking”**

**Speaker:** William Clemens, DTE Energy

Innovative utilities are putting the power of their data to work and using predictive analytics to drive marketing strategy for their DSM programs. DTE Energy, along with DNV GL, used their customer participation data to increase participation in served and underserved territories. Through a live demonstration of an analytics tool, you will see the dialogue between utility and implementer as they move towards their 100% customer participation goal. See how analytics-based marketing works effectively and learn how: 1) Energy Consumption grouping process was performed at the customer level; 2) To apply derived metrics like savings and participant ratios; and how to leverage these metrics and 3) To identify customer segments with the highest energy-savings potential.

**Disruptive Change: Moving from Talk to Reality in DSM Program Strategy**

**Speaker:** Diane Levin, Cadmus

In this presentation, we will discover how utilities can walk through the vision and implementation steps necessary to create analytics-based programs. Utilities will then be able to provide their customers with information when it is relevant on the customer side, creating better uptake on measures and increased customer

**Moderator:** Raegan Bond, Dunsky Energy Consulting

**Speakers:** Andrea Pratt, City of Seattle and Karen Hsu, eMotorWerks

Hear an overview of the EV market from equipment participants and gain an understanding of the EV landscape. You will explore how utilities can accelerate electrification of the transportation sector in much the same way they have accelerated energy efficiency – by understanding the technological and market opportunity, addressing barriers through programs and infrastructure, and maximizing stakeholder benefits. Key take-aways: 1) Understanding the fundamentals of the EV market; 2) Learn what’s needed to drive EV adoption and 3) Understanding utility program (and related) options for accelerating EV adoption.

**Speakers:** Thomas Brubaker, PECO and Kelly Zonderwyk, ICF

When a few customers are responsible for most of a company’s sales, they’re referred to as “whales.” Increasingly, though, utilities need to meet savings goals by tapping harder-to-reach medium-sized customers – fondly dubbed “jumbo shrimp.” To be successful, marketing and outreach must function as one team, beginning with understanding and applying the principles of a classic sales funnel. A sales funnel is the buying process companies lead customers through. You will get a rare opportunity to build your own sales funnel strategy by working in groups to select a decision maker at a specific business type. The groups will identify the most appropriate channels and tactics to move that customer through each stage of the funnel as well as the metrics that need to be collected at each stage. Learn from your peers and how their group developed their sales funnels.

	<p>loyalty. You'll have the flexibility and information to engage your customers with distributed resources and achieve your vision of using behind the meter information and tools for grid management. Understand how:</p> <p>1) Traditional DSM programs will eventually not be sustainable, and an analytic-based roadmap will lead to creative new DSM programs; 2) New skills/staffing will be required to obtain the next level of savings; and 3) Utilities that start today will improve customer satisfaction and have EE and DER as grid management tools.</p>		
Noon – 1:30 PM	<b>Networking Lunch – Expo Hall</b>		
<b>Session 3</b>	<b>Electrification</b>	<b>Smart Thermostats</b>	<b>Program Design and Implementation</b>
1:30 – 2:45 PM	<p><b>Moderator:</b> James Linder, TVA  <b>Speakers:</b> Cynthia Austin, SMUD  <b>Let's Not Call It Electrification</b></p> <p>In support of their recently adopted Integrated Resource Plan, the Sacramento Municipal Utility District (SMUD) has embarked on aggressive decarbonization policies, including building electrification efforts. SMUD's building electrification program initiatives have included all-electric residential new construction incentives, gas-to-electric whole house retrofits (which includes both space and water heating conversions) incentives, and prescriptive gas-</p>		<p><b><i>Innovative Financing Program Design for Hard to Reach Markets</i></b></p> <p><b>Speaker:</b> Alex Hill, Dunsky Energy Consulting</p> <p>Financing programs for efficiency and renewable energy are becoming more commonly understood as successful models. However, despite the success of Property Assessed Clean Energy financing and On-Bill Repayment programs, there remains a challenge to reach low to moderate income households, multi-family buildings, and small businesses. To expand the reach and impact of financing, and address important equity challenges, some innovative financing</p>

	<p>to-electric heat pump water heater conversion rebates. This presentation will information from SMUD’s first program implementation year, including customer market research study results, lessons learned in programmatic tactics, and next steps.</p> <p><b><i>From Bird’s Eye to Worm’s Eye: Implementing Beneficial Electrification in the Upper Midwest</i></b></p> <p><b>Speaker:</b> Justin Margolis, Slipstream and Dianna Cacko, Slipstream</p> <p>The promise of electrification to usher in large and enduring environmental and economic benefits is undeniable. We know where we need to go but how do we get there? This presentation will send you to the Upper Midwest where a beneficial electrification pilot is underway for a collaborative of cooperative utilities looking to accelerate adoption of heat pump technology. You will be given a firsthand perspective into the tricky endeavor of putting the puzzle pieces together and translating the big idea of beneficial electrification into initiatives that work for real communities.</p>		<p>program design options are emerging to address these hard-to-reach markets. The Learning Lab will be conducted in 3 steps: Brainstorming key financing challenges and opportunities; Successful examples from the field; and a Program Design Hack-a-Thon. You will have a unique opportunity to think through the process of characterizing a hard-to-reach market and then design a program to address the key barriers.</p>
2:45 – 3:15 PM	<b>Networking Break – Expo Hall</b>		
<b>Session 4</b>	<b>DERs</b>	<b>Policy</b>	<b>Customer Engagement</b>
3:15 – 4:30 PM	<b><i>Crossing the Communications Chasm: Bridging Utility ‘Silos of Excellence’ in a</i></b>	<b><i>Perspectives on Northwest Policy</i></b>	<b><i>You Don’t Need a Psychic to See Your Future (State) – customer experience design and</i></b>

***Distributed Energy Resources (DERs) World***

**Speaker:** Olivia Patterson, Opinion Dynamics

DER adoption is exploding nationally. According to Green Tech Media, as of 2017, behind-the-meter DERs contributed 46.4 GW of impact on US summer peak. With more DERs, a greater focus on grid management strategies is needed to support ever growing projects. A focus on metrics that meet resource planning criteria, as well as DSM metrics including energy savings, load impacts, customer satisfaction, and scalability will be discussed. You will also receive a primer on the taxonomy of energy efficiency, demand response, and distributed energy resource needs from myriad perspectives, to ensure the programs achieve what is important to grid planners, program managers and evaluators.

***Driving DER Success through Integrated Modeling***

**Speaker:** Ryan Bossis, ERS

Interest in DERs has proliferated in recent years, but a fundamental question remains, how is value captured across the stakeholder chain – from customers and vendors, to program administrators and grid planners. DERs add increased complexity to the efficiency world, operating as both a generation source and load. This class will approach customer-sided DER integration through a holistic modeling approach, exploring interactions

***journey mapping***

**Speakers:** Vanessa Barbarisi, ILLUME Advising and Chris Baker, The Weidt Group

Customer experience doesn't happen just once. It's a series of interactions that contribute to the customer's perception of an organization and how they think and feel about the experience. It should also contribute to the customer's decision-making process. Customer experience requires specific intention by an organization and staff. Building from journey map work, a future state map provides guided and informed direction on how to design and market energy efficiency programs. A customer journey case study will illustrate how designing programs that focus on the customer decision-making process can drive greater savings and high customer satisfaction.

	of DERS with each other and with energy efficiency. We will walk through several examples to illustrate both the technical and economic challenges and discuss ways to maximize the value stack of these resources for all stakeholders.		
4:30 – 5 PM	<p><b>Professional Development</b></p> <p><b><i>The Value of Mentorship and Sponsorship and How to Maximize Both</i></b>  <b>Speaker:</b> Amanda Gasse, ERS</p> <p>To be successful in today’s ever-changing business environment, companies must understand employees’ needs, aspirations, and motivations. According to a 2016 Millennial Survey, 63% of millennials believe their leadership skills are not being fully developed, and millennials who have a mentor are twice as likely to stay with their organization. Mentoring relationships are not new, but they have recently become more formalized and recognized as a valuable form of professional development. Sponsorship, advocating on behalf of another employee, can be a critical key to success. One of the best ways to build sustainable leadership is through mentorship and sponsorship programs. During this session, you will: 1) understand the differences between mentorship and sponsorship and how to build robust and sustainable programs that prioritize diversity and inclusion; 2) learn how to train mentors and protégés for their roles in order to establish a high-impact program with measurable success components; and 3) hear about existing mentorship programs in the industry and what it takes to start and manage a program.</p>		
5 – 6:30 PM	<b>Networking Reception and Expo Prize Drawings – Expo Hall</b>		

## Wednesday, May 8, 2019

7:15 AM	<b>Registration Desk Open</b>		
7:45 – 8:45 AM	<b>Networking Breakfast – Expo Hall</b>		
<b>Session 5</b>	<b>Meter Based Programs and M&amp;V</b>	<b>ENERGY STAR®</b>	<b>Marketing</b>

<p>8:45 – 10:00 AM</p>	<p><b>Moderator:</b> Charmaine Cigliano, Orange and Rockland</p> <p><b><i>Seattle City Light Pay for Performance Program</i></b></p> <p><b>Speaker:</b> Colm Otten, Seattle City Light</p> <p>After 6 years in pilot mode, Seattle City Light officially launched their Pay for Performance program (P4P) in September 2018. Through the program, property owners and operators can receive incentive payments over time for verified energy savings. P4P pays a set incentive amount for the total energy saved at the electric meter, rather than separate incentives for different measures. This allows for more flexible and creative projects, helping you to find even more ways to save. Today, you will hear more about the program, results thus far and plans for the future. The benefits of participating in the Pay for Performance program are numerous including: financial and technical support; P4P may meet a building’s required tune-up in the City of Seattle; P4P can help achieve energy savings of 15-20%; allows creativity and flexibility when implementing projects; and offers the same incentive for capital and non-capital measures; etc.</p> <p><b><i>Graduating from Deemed Savings: the challenges and opportunities with residential meter-based measurement and verification</i></b></p> <p><b>Speakers:</b> Michael Lauchaire, Central Hudson Gas &amp; Electric and Andy Frank, Sealed</p>	<p><b><i>Perspectives on ENERGY STAR</i></b></p> <p><b>Speakers:</b> Marti Frank, Efficiency For Everyone; Daniel Cronin, EPA; and Gillian Saidman, L'Image Home Products, Inc.</p>	<p><b><i>Innovate Your Marketing with Market Influencer Partnerships</i></b></p> <p><b>Speaker:</b> Karen Germain, DNV GL</p> <p>From this presentation, you will understand how to work with Market Influencers in a mature energy efficiency (EE) program, how to build a strategy, and to place a greater emphasis on Market Influencers in implementation. You’ll receive a Market Influencer Tool Kit which provides insight on channel appropriateness, selection criteria, and strategic engagement. You’ll also be presented a base case of a mature program, and strategic objectives and goals. At the end of this hands-on interactive session you will have a better, more robust appreciation of Market Influencers and how they can be leveraged to improve the performance of a mature EE program. The output from the assignments will be collected and collated, then shared with all participants following the conference.</p>
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	<p>With the rise of Pay for Performance (“P4P”), Non-Wires Alternatives (“NWAs”), and Non-Pipeline Solutions (“NPS”), residential measurement and verification (“M&amp;V”) based on meter reads is becoming increasingly necessary to provide regulators, grid planners, and other stakeholders with the granularity and confidence necessary to make investment decisions. But while meter-based M&amp;V has its advantages, the transition from deemed savings based on Technical Resource Manuals (“TRM”) can be challenging. Key takeaways from this session are learning how: 1) Meter-based M&amp;V has the potential to provide value to utilities and other stakeholders; 2) Any utility rolling out meter-based M&amp;V needs to account for some unique challenges, and 3) There are practical best practices to roll out meter-based M&amp;V.</p>		
10:00 - 10:45 AM	<b>Networking Refreshment Break – Expo Hall</b>		
<b>Session 6</b>	<b>Low Income</b>	<b>Evaluation</b>	
10:45 AM – Noon	<p><b>Moderator:</b> Jon Phelps, APTIM</p> <p><b>Heating Up Demand Response in Low Income Programs</b></p> <p><b>Speakers:</b> Sheri Borrelli, United Illuminating and Tyler Rogers, EnergyHub</p> <p>Recently, UI implemented a pilot program through their Home Energy Solutions- Income Eligible (HES-IE) program whereby eligible customers receive an ENERGY STAR® certified heat pump water heater (HPWH) at no cost to reduce their energy burden. In addition, this program married WIFI thermostat enabled customers</p>	<p><b><i>“I’m An Evaluator, and I’m Here to Help,” As the Implementer Laughed Uproariously – 360 Embedded Evaluation</i></b></p> <p><b>Moderator:</b> Jeff Ihnen, Michaels Energy</p> <p>Independent third-party program evaluation results are usually delivered long after the window of opportunity to benefit program implementers has closed. Evaluators are attempting, with some success, to provide feedback in “real-time” rather than waiting to deliver reports. Evaluation embedded within program implementation is an alternative to independent third-party evaluators delivering late and largely unused evaluation results.</p>	

	<p>to UI's DR program to further reduce customer's usage which helped fixed income customers save up to 50% on their energy bills. Learn how UI's innovation differs from other utilities because they bundled EE upgrades with DR in the income eligible segment specifically targeting HPWHs which has not been done earlier. UI also used the Energy Hub Mercury platform to capture their HPWH AMI data which has also not been done before.</p> <p><b><i>The Energy Efficiency Programs That Low-Income Small Businesses Need</i></b></p> <p><b>Speaker:</b> Thomas Manjarres, Franklin Energy</p> <p>Through collaborative research with graduate students at Illinois Institute of Technology, the Peoples Gas and North Shore Gas Energy Efficiency Research and Development program have gained valuable insights into low-income customer behavior. The research set out to answer the question "Why do energy efficiency (EE) program participation rates in low-income communities lag behind the corresponding rates in higher-income communities?" For utilities, program administrators, and implementers alike, the three most important insights were: 1) The problem is not due to a lack of awareness, but rather a lack of trust; 2) New technologies are not always needed to penetrate new/underserved markets; and 3) To access small businesses, offer them a trojan horse to energy efficiency. Learn more about these impactful results and discuss how to overcome the challenges.</p>	<p>Embedded evaluation integrates evaluation with implementation – evaluators work with program managers and implementers. This 360° Panel enables you as program managers or implementers to express your hesitation or fears with embedded evaluation; provide embedded evaluation advocates the opportunity to present the case for making this practice the norm; and allow seasoned independent evaluation professionals an opportunity to resist with tough questions. Fun is promised for all in attendance.</p>
Noon – 1:30 PM	<b>Lunch and Closing Plenary Session</b>	
2 – 5:30 PM	Post-conference Training – DSM Program Manager Workshop Part I (for utilities only)	
<b>Thursday, May 9, 2019</b>		
8 AM – 4:00 PM	Post-conference Training continued	