Joint IOU
Integrated Demand Side Management
Quarterly Summary and Compliance Tracking Report

1st Quarter 2014

2013-2014
Statewide DSM Coordination and Integration Program

FINAL
Submitted
May 1, 2014
Background and Overview

This report is provided in compliance with California Public Utilities Commission (Commission or CPUC) Decision 09-09-047 ("EE Decision"), which directed the Investor Owned Utilities (IOUs) to establish a Statewide Integrated Demand Side Management (IDSM) Task Force (Task Force) and to file a joint advice letter that includes a detailed explanation of tasks, timelines, and role of the Task Force in addressing eight integration tasks described in the EE decision. The Task Force determined that a quarterly overview report is an appropriate method for providing periodic reporting of activities to the Commission. This reporting approach was reconfirmed in the 2013-14 IDSM Program Implementation Plan (PIP).

Organization of the Quarterly Report

This Overview Report provides a highlight of quarterly activities, organized in order of the eight directives of the IDSM Task Force. The IOU sections under the directive headings list the pilots, programs, efforts, and activities with data and webpage links where available for easier access to additional information and to streamline this report. The IOUs have provided all of their Q1 section updates including the highlights in detail in the Q1 2014 IOU Tracking Workbook including statewide efforts. Each section of the highlight document references the appropriate tab number in the workbook for the corresponding section. Tab numbers of the Excel Tracking Workbook can be found in the upper left corner of each page as well as a heading, naming the section. In addition, there are sections under each directive for information on the Evaluation, Measurement and Verification (EM&V) studies that will be conducted in the 2013-2014 timeframe entitled “2013-14 EM&V Research Studies.” All Joint IOU Quarterly Overview Reports and Tracking workbooks are uploaded and available for viewing on California Energy Efficiency Statistic Data Portal (EE Stats).

Directives 1 and 2: Cost Effectiveness and EM&V

The Task Force is exploring a phased approach to developing an appropriate methodology to calculate integrated cost effectiveness and an integrated EM&V approach for IDSM programs and projects.

- Integrated Cost Effectiveness Research will establish the data needs to inform the understanding of integrated cost effectiveness for IDSM programs and projects.
  - There were no IDSM activities related to Cost Effectiveness in the first quarter

- An integrated EM&V Whitepaper is expected to show how the IOUs and ED document and attribute energy savings and demand reduction to IDSM project implementation, using methodologies established from evaluation.
  - There were no IDSM activities related to the development of an integrated EM&V approach in the first quarter.
Directive 3: Integrated Emerging Technologies

Both the IOUs and the Task Force track emerging technologies that have some combination of EE, DR and/or renewable self-generation capabilities.

The table below lists newly identified and/or integrated Emerging Technologies (ET) that had significant status changes that are being tracked by the IOUs. Details of the Q1 SW ET effort are outlined in the Excel Tracking Sheet Q1 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tab 1 SW Emerging Technologies.

<table>
<thead>
<tr>
<th>Utility</th>
<th>Integrated ET</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PG&amp;E</td>
<td>Home Energy Management: Scaled field placement to track customer interaction, satisfaction and energy savings from normative/behavioral messaging via mobile applications and web portal as it relates to a customer’s programmable thermostat.</td>
<td>Phase A of the larger field-testing completed in December 2012. Monitoring will continue through early 2014. Estimated completion May 2014.</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>ZNE Retrofits at UC Davis: Develop and test ZNEH retrofit strategies at a student co-op residence at UC Davis. Partner with UC Davis Energy Innovation Hub, EEC, and Geothermal Collaborative. There will be a Phase 1 and Phase 2. Phase 2 will run parallel to Phase 1 for a few months and will monitor site for approximately one year.</td>
<td>Retrofits installed and monitoring has begun. Phase 1 to complete in May 2014. Phase 2 to complete in Dec 2014.</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>Residential Smart Thermostats Testing: M&amp;V study to perform a pre-post energy usage assessment of several residential smart thermostats to develop a new mass market PG&amp;E combined EE and DR incentive program.</td>
<td>Test bed in place for testing tstat functionality; M&amp;V study is on hold. PG&amp;E pursuing Pilot for Res. stats instead. Test bed completion targeted for May 2014.</td>
</tr>
<tr>
<td>PG&amp;E</td>
<td>PG&amp;E/Honda Smart Home: Partner with Honda and UC Davis on a single family ZNE model home at West Village. PG&amp;E EE ET will contribute funds towards EE technologies for the home as well as monitoring by an M&amp;V firm. There will be a Phase 1 and Phase 2. Phase 1 will be a demonstration showcase at completion of construction. Phase 2 will be ongoing monitoring of the home.</td>
<td>Home construction completed in March 2014 with Grand Opening held on March 25th. PG&amp;E demonstration showcase scheduled for May 1, 2014. Phase 1 to complete in May 2014. Phase 2 to complete in Feb 2015.</td>
</tr>
<tr>
<td>SCE</td>
<td>Energy Usage Social Gaming Assessment</td>
<td>Estimated completion is Q4 2014</td>
</tr>
<tr>
<td>SCE</td>
<td>Hotel Room Occupancy Controls</td>
<td>Estimated completion is Q1 2014</td>
</tr>
<tr>
<td>SCE</td>
<td>ZNE Homes Market Study</td>
<td>Estimated completion is Q2 of 2014</td>
</tr>
<tr>
<td>SCE</td>
<td>ZNE New Home Site1</td>
<td>Estimated completion is Q4 2014</td>
</tr>
<tr>
<td>SCE</td>
<td>ZNE Institutional Retrofit</td>
<td>Estimated completion is Dec 2014</td>
</tr>
<tr>
<td>SCE</td>
<td>ZNE Tract Homes Retrofit</td>
<td>Estimated completion is 2015</td>
</tr>
<tr>
<td>SCE</td>
<td>ZNE Low-rise Office</td>
<td>Estimated completion is 2016</td>
</tr>
<tr>
<td>SCE</td>
<td>Home Energy Display</td>
<td>Estimated completion is Q2 2014</td>
</tr>
<tr>
<td>Utility</td>
<td>Integrated ET</td>
<td>Status</td>
</tr>
<tr>
<td>---------</td>
<td>-------------------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>SCE</td>
<td>Residential ZNE Retrofit - Lessons Learned</td>
<td>Estimated completion is Q3 2014</td>
</tr>
<tr>
<td>SDGE</td>
<td>OpenADR 2.0 A/B Evaluation</td>
<td>Final report estimated to be completed in Q4, 2014.</td>
</tr>
<tr>
<td>SDGE</td>
<td>Smart Grid for Buildings</td>
<td>Final report and technology transfer are scheduled to complete by Q2, 2014.</td>
</tr>
<tr>
<td>SDGE</td>
<td>CSI Low cost Solar PV Demonstration</td>
<td>A follow up study is being developed with expected completion by Q1 2015.</td>
</tr>
<tr>
<td>SCG</td>
<td>Playa Vista ZNE Project</td>
<td>Estimated completion is middle of 2014.</td>
</tr>
<tr>
<td>SCG</td>
<td>LINC Lancaster Near-Zero Project</td>
<td>Estimated completion is end of 2014.</td>
</tr>
</tbody>
</table>

**Directive 4: Integrated Audits**

The IOUs created online integrated audit tools for residential and small to medium size business customers with customized audit recommendations based on customer profiles, operating characteristics, market sector potential and cost-effectiveness. The IOUs also enhanced existing integrated tools to include solar-related functionality. The IOUs continue to offer onsite integrated audits to small, medium, and large customers.

Information on the IOUs’ Q4 integrated audit tool continued development are outlined in the Excel Tracking Sheet Q4 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tab 2 SW Audit Tool.
Directive 5: Integrated Pilots, Programs and Activities

The Task Force regularly reviews and tracks results of various programs, IDSM Pilots, and other activities. The Task Force identifies and promotes integration opportunities and tracks projects where there are integrated efforts underway in order to identify and develop best practices.

Pilots Update - Details on the Q1 IOU Pilot effort are outlined in the Excel Tracking Sheet Q1 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tabs 3-5 for the individual IOU pilots information.

SCE

- **Sustainable Communities/ZNE:** The program is working on improved analysis tools to aide in project consultation. There were also ongoing efforts on multiple large master planned development projects.

- **EE/DR Pilots:** Goals have been established and progress has continued.
  - **Non-Residential New Construction:** The ISDM Non-Residential New Construction Pilot Program completed a thorough internal reassessment in the fourth quarter of 2013 carrying into early first quarter of 2014. Baseline criteria, timelines and critical path objectives have been firmly reestablished, setting the course for the pilot program for the remainder of 2014 and into 2015. The pilot program intends to enroll the participation of between four and six individual new construction projects (separate pilot sites) by the end of the second quarter of 2014 for this cycle of the pilot. Upon enrollment each site will commence with DR (specifically Auto-DR) integration activities into the design/build phase leading toward construction. As of this report, three very strong candidates have successfully passed an initial screening eligibility review and meetings are planned with three additional candidates in the very near future. Construction activities on all participating sites are expected to commence toward the end of the 2014 calendar year or, at the very latest, within Q1 or very early Q2 of 2015.

- **Residential New Construction:** No updates for Q1.

- **Institutional and Government Partnerships Pilot:** IDSM audits were completed at Edwards Air Force Base, Naval Base Ventura County, and Antelope Valley Fairgrounds. The SCE Mobile Energy Unit participated at Fort Irwin Earth Day Celebration in March. Future Earth Day participations confirmed. Account Management continues to work with targeted customers to convert audit findings into projects.

- **Energy Leaders Partnership Pilot:** In order to support IDSM efforts with over 100 City and County partners, SCE conducted or supported the following activities:
  - March 3, 2014: IDSM Presentation, San Gabriel Valley Partnership Kickoff
  - March 3, 2014: IDSM Community Forum conducted by City of Manhattan Beach
  - March 31, 2014: Demand Response Lunch and Learn conducted by City of Irvine

The Community Forum and Lunch and Learn presentations provide an opportunity for these communities to demonstrate their IDSM leadership.
Planning for Q3 also started to take place. In Q3 the plan is to host a series of WebEx and Workshops that further educate and bring awareness around the topic of IDSM to partnership customers.

- **Technology Resource Innovative Program (TRIP):** The TRIP contracts were extended into 2014 for full performance on their purchase orders. A fourth TRIP RFP was released in Q1 and will be issuing purchase orders in Q2.

- **WE&T — Connections Program:** Most Connections program had Smart Students IDSM activities.
  - **PowerSave Schools** - All IDSM updates are complete. Mr. Eco delivered its IDSM school assembly to one school. All is now in place to deliver “Smart Energy Experience” IDSM field trips to participating PowerSave School. First trip is scheduled for mid April.
  - **PEAK** - Spring 2014 Watt Meters Campaign kicked off in March, reaching over half its enrollment goals of 2,000 students. Campaign continues through April.
  - **LivingWise** - All is now in place for a targeted spring 2014 Energy/Water Nexus campaign in partnership with SoCal Gas and the Coachella Valley Water Agency. Kits and curricula will be distributed to 800 students, starting April 1. Another targeted campaign is planned for the fall semester.
  - **PowerSave Campus** - In collaboration with IDSM Partnerships Operations, one campus hosted the Sprinter Van, an IDSM on wheels outreach and interactive experience.

- **Upstream HVAC with Automated Demand Response (ADR):** The project team has completed an incremental measure cost analysis and an initial incentive design. Distributor/contractor participation agreements are in development. We have at least two memos of understanding from the manufacturers to stock and upsell ADR controls with their high efficiency HVAC systems. Pilot will roll out in April 2014.

- **IDSM Retro-commissioning (RCx):** Pilot was launched in October 2013. The RCx and Auto-DR program assessments have been completed and recommendations and pilot design have been approved. Marketing materials and customer recruitment to start in the middle of Q2.

- **Sustainability Circles:** Program launched in Q4 2013. Marketing materials have been created and the program has been promoted at multiple account representative meetings and the IDSM Roll Out. Due to customer recruitment issues, Circles start date has been delayed until Q2 2014. However, in a joint effort with SoCalGas, three circle sessions for school customers have been completed and the fourth EEC will be held in April 2014. Participants have found the sessions to be informative and of value.

**SDG&E**

- **DR Small Customer Technology Deployment (SCTD):** SDG&E’s SCTD Program for residential has selected ecobee thermostats through an RFP process for its demand response program. This Wi-Fi- and ZigBee-enabled thermostat also displays near real-time energy consumption via the ZigBee meter connection. The ecobee thermostats have received SDG&E compatibility and security validation allowing them to connect to their Itron smart meters. A field test was completed in October 2013 resulting in successful installation of ten thermostats and confirmed DR signaling via Wi-Fi and ZigBee. Phase 2 of the deployment is scheduled to begin in Q2 2014, with some devices being installed in time for the 2014 Demand Response season, and the remainder being
installed by the end of the year. Customers targeted for this deployment will include those who indicate high summer peak usage and are eligible for the Reduce Your Use program and/or upcoming TOU rates. Phase 3 of the deployment may include integration with other EE Programs such as Energy Upgrade California.

- **New Construction Demand Response Pilot:** SDG&E’s New Construction DR Pilot is collaborating with New Construction EE (California Advanced Homes Programs and Residential Middle Income Direct Install) along with Low Income (ESA) to sponsor a Habitat for Humanity new construction and neighborhood revitalization project. The goal for NCDRP is to recommend and implement DR strategies and devices, along with the EE measures to provide the new homeowner the most comprehensive IDSM offering of utility programs and services. The home will be built using 500 volunteers over a weeklong period in June 2014. Upon completion of this project, NCDRP will complete a load-shed test to validate the effectiveness of installed measures and the customer will then have the potential to participate in Auto-DR events with the potential of ongoing financial benefits and energy reduction.

- **Small-Medium Business Thermostat Deployment:** SDG&E has selected ecobee thermostats through an RFP process for the deployment of demand response enabled programmable communicating thermostats to small and medium business customers. This effort has been aligned with the Premium Cooling and Efficiency Program and Direct Install Program in order to leverage existing contractors at customer sites to promote the offer and recruit customers along with providing the installation services. A field test was completed in October 2013 resulting in successful installation of 18 thermostats and confirmed DR signaling via Wi-Fi. Phase 1 of this project was completed in Q1 2014 with the Premium Efficiency Cooling Program completing 400 installations. In preparation for full launch of Phase 2, 14 participating contractors have completed classroom and hands-on installation training with ecobee, and procedures have been completed and distributed to all contractors. The marketing design of the postcard was completed with an integrated DR & EE offer. These marketing postcards promoting both the Direct Install, Premium Efficiency Cooling and ecobee offer will be released in Q2 2014. Plans are also underway to offer the ecobee solution along with the new TOU rates starting at the Energy Showcase in May 2014.

**SOCAL GAS**

- **Sustainable Communities:** SCG is assisting Playa Vista with the design of the Playa Vista Community Center, which will include latest cogen technology to generate both hot water and electricity. Project is currently underway in Q1 with the cogen/CHP unit being installed.

- **Multi-Family Single Point of Contact:** Continued working with LINC housing to enroll more properties and started engaging Park La Brea, the largest multi-family complex in California. In Q1 SoCalGas has brought on board a full-time dedicated account executive to interface with multi-family portfolio owners. The new account executive is currently recruiting new portfolio owners.

- **Municipal Electric and Water Utility Partnership:** SoCalGas signed a master partnership with the City of Anaheim and the City of Riverside in Q4 of 2013. This allows SoCalGas to create joint programs with these cities under the umbrella agreement.

- **Los Angeles Department of Water and Power Partnership:** SoCalGas has ten joint programs with LADWP to deliver gas, electric and water savings in their joint territory (mostly the city of Los Angeles and parts of the San Fernando Valley). No new programs were launched in Q1 2014. SoCalGas conducted a program review meeting for programs it is leading in order to foster continuous improvement.
**Integrated Internal Training Efforts** - Details on the Q4 SW Internal IDSM Training effort are outlined in the Excel Tracking Sheet Q1 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tab 6 SW Internal IDSM Training.

**PG&E**

PG&E conducted two Integrated Sales Summits in March 2014: Stockton and Santa Cruz. Over 400 staff attended these events. The Summit provided training to Energy Sales and Service (ES&S) field representatives. In advance of the summits, PG&E also put out a call for integrated case studies. Awards were given to 12 field reps who submitted the best examples of integrated project case studies. A few case studies that exemplified key lessons learned about what makes for a successful integrated project were presented at the morning kick-off presentation given by IDSM program lead, Leif Magnuson. These lessons learned were:

1. **Regular contact with customers, especially face-to-face.** Customers cite our persistence as a positive distinguishing characteristic of PG&E in getting them to maximize their implementation of integrated measures.

2. **Understanding and informing the customer's goals and priorities.** Understanding our customers’ personal and organizational goals as they relate to energy is essential. Many larger companies have Sustainability Plans or Environmental Management Systems with explicit goals. Companies that don't already have clear goals benefit from PG&E’s assistance in developing them. We help our customers keep on track in meeting their milestones and deliverables. This leads to more integrated projects.

3. **Integrating 3rd parties into projects.** Third parties provide customers important affirmation of the project goals and implementation strategies that PG&E has developed with the customer. This reassures customers that they are doing the right things.

4. **Offering a turn-key solution.** PG&E’s New Revenue Development (NRD) department is now offering turn-key energy efficiency services to non-Federal customers. Modeled on the successful Utility Energy Services Contract (UESC) for Federal customers. These services help larger customers attack more ambitious, multi-year projects involving integrated EE, DR and DG measures in one package. PG&E serves as the full service project developer bringing all elements of assessment, design and implementation—including financing and qualified third party subcontractors—to the table. Customers appreciate that PG&E is transparent about all project costs, including direct construction costs, overhead and mark-up. Customers also value their long-term relationship that ensures PG&E will be around long after the completion of initial construction, commissioning and M&V. This turn-key offering is the latest strategy among many that PG&E employs to get customers to “Go Big.”

**SCE**

On February 6, 2014 SCE held its second IDSM Summit to increase knowledge and awareness on integrated approaches, meet regulatory compliance directives and to promote communication between BCD, IDSM Operations and Marketing. The theme was “We're better together!” and approximately 287 employees and 44 third party vendors attended the event. Attendees filled out surveys providing feedback, which have proved very instructive for capturing their understanding of integrated approaches and for establishing the additional tools and resources needed to successfully deliver integrated offerings to customers.

In addition to management panels and breakout sessions focused on customer segments, 14 customer projects and teams that have been instrumental in delivering integrated projects over the past few years were recognized at an Integrated Awards Lunch. Overall, the feedback was extremely positive and instructive for making modifications for future IDSM Roll Outs/Summits and for leveraging the information provided to attendees to support their current and ongoing efforts.
**SDG&E**
A training date has been set for June 13, 2014 that will capture a very wide audience of those needing training. The agenda has also been finalized.

**SoCalGas**
An internal quarterly training was held in March to discuss gas, electric and water program partnerships with municipalities in Southern California. Program staff was trained on an all updated program manual that covers all aspects of joint program operations, including communications, marketing, and billing.

**Integrated WE&T Update** - Details on the Q4 IOU WE&T effort is outlined in the Excel Tracking Sheet Q1 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tabs 7-12 for the individual IOU's WET course information.
**Energy Savings Assistance Program (ESA)** - Details on the Q4 IOU ESA Program are included in the Excel Tracking Sheet Q1 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tabs 13-16 for the individual IOU's ESA Programs.

**PG&E**
In Q1, MIDI served 1,000 hard-to-reach, moderate-income customers in regions of PG&E’s service territory. Efforts to integrate service delivery with California Alternate Rates for Energy (CARE) and Family Electric Rate Assistance (FERA) are ongoing.

**SCG**
The implementation of IDSM measures at City Gardens has concluded. SCG is currently working with LINC to deliver a comprehensive audit at a property in Ontario, and started deploying ESAP at two of their properties. SCG is also working closely with LINC and SCE on the implementation of the near-zero net energy for 30 units in Lancaster, CA. SoCalGas has brought on board a full-time, dedicated account executive for multifamily property owners in Q1 2014. This AE will help integrate SoCalGas' various programs and offerings with those from the electric and water utility in their presentation to the multifamily portfolio owners and managers. The new AE began reaching out to multiple portfolio owners in Q1.

**SDG&E**
The ESA Program staff continues to work with energy efficiency program (MIDI, EUC, and MFEER) staff to further collaborate and streamline program processes. Referrals continue to be provided to the MIDI program of customers that exceed the ESA Program income guidelines.

**SCE**
Representatives of the Mobile Energy Unit (MEU) Program attended five customer events. Customers were provided educational materials regarding energy efficiency, demand response, SmartConnect™, self-generation, and low-income programs. The MEU Program received leads requesting for more program information and completed CARE/FERA applications and ESAP inquiry cards. A total of 21 leads were generated through CARE/ESA outreach efforts.

<table>
<thead>
<tr>
<th>Type of Indicators (Q4)</th>
<th>Lead counts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of Events</td>
<td>5</td>
</tr>
<tr>
<td>Total number of Event Days</td>
<td>6</td>
</tr>
<tr>
<td>Total number of Customer Contacts</td>
<td>893</td>
</tr>
<tr>
<td>Total number of Leads by person</td>
<td>0</td>
</tr>
<tr>
<td>Total number of Energy Efficiency leads generated</td>
<td>16</td>
</tr>
<tr>
<td>Total number of Low Income leads generated</td>
<td>5</td>
</tr>
<tr>
<td>Total number of leads generated</td>
<td>21</td>
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<tr>
<td>Total CARE/FERA applications collected</td>
<td>2</td>
</tr>
<tr>
<td>Total ESA (EMA) applications collected</td>
<td>3</td>
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<tr>
<td>Total interested in Low Income</td>
<td>15</td>
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<tr>
<td>Total interested in CSI</td>
<td>47</td>
</tr>
<tr>
<td>Total interested in SmartConnect</td>
<td>13</td>
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</table>
**Integrated Efforts Update** - Information on the Q4 IOU Integrated Efforts are outlined in the Excel Tracking Sheet Q1 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tabs 17-20 for the individual IOU’s IDSM efforts.

**Integrated Project Highlights**

**PG&E Integrated Project Profile—City of San Luis Obispo**

The San Luis Obispo wastewater treatment plant is the single largest energy user in the City representing a cost of $400,000-$500,000 a year. Rated at 5 MGD (million gallons a day), the plant processes the equivalent of 13.6 billion Evian bottles (16oz) every year. Additionally, the County of San Luis Obispo is facing severe water issues that make the need for efficient water reclamation both expedient and high profile (water-energy nexus).

In support of the City’s Climate Action Plan (CAP), the plant committed that “no decision would be made at the facility without energy in the equation.” Plant staff was looking for a creative public/private partnership to capitalize on energy and operational efficiencies and replace/upgrade aging systems. Local PG&E Energy Sales and Service Representative, Tom Lorish, introduced PG&E’s new Sustainable Solutions Turnkey (SST) program approach to the plant management team as a potential option to achieve these goals.

**SST Process Overview**

Assess goals and opportunities
- Analyze cost, savings, incentives and environmental benefits
- Prepare reports and applications for incentives, financing and City Council approval
- Design and develop measures including contractor bidding and selection
- Firm fixed-price construction cost for entire project
- Construct with administration and management of all project elements
- Commission, train and M&V

**Highlights of Measures**
- Replace failed biogas cogeneration (CHP) system
- Upgrade pumping with new high-efficiency systems and VFDs where appropriate
- Upgrade process equipment (headworks, RAS, filtration media, solids dewatering)
- Modernize and augment SCADA systems

The improvements to the plant will help the environment by reducing the amount of greenhouse gasses that are released into the atmosphere. The upgrades will reduce carbon dioxide emissions by one million pounds annually. That’s the equivalent of planting 378 acres of forest, taking 96 cars off the road or powering 69 homes.

In May 2013, the San Luis Obispo City Council approved the recommended financing strategy for this project at a total cost of approximately $9.5 million, paving the way to start the construction early 2014. When the project is completed and the upgrades are made, it is projected that the City could save up to $8 million over 25 years. Construction was kicked off at a January 2014 VIP event.
SCE Integrated Project Profiles

At the 2014 IDSM Summit, SCE recognized teams and customers that implemented integrated projects. Typically, the account reps work with the customer and internal SCE support staff in the audits and IDSM Operations areas to offer customers integrated solutions. Ultimately, the customer determines the best combination of projects for their budgetary and operational needs. Examples and summaries of integrated projects from various customer segments include the following:

- A prominent food processing company whose primary products are customized blends of orange, lemon and grapefruit juices, oils, essences, and pulp was recognized for integrated projects with EE and DR.
  - They participated in several EE projects and in 2013, they saved about 3,443,224 kWh, 220 kW, and received $472,135 in incentives for projects including the following:
    - Refrigeration Project,
    - Fruit conveyance system re-design
    - Plant Lighting retrofit from HID to T5/T* Fluorescents
    - Increased refrigerated storage tanks
- For Demand Response, the company has 4 accounts equating to about 7,000 Kw of demand response through the BIP program
- They have a PV Project under consideration

Irvine Company

- Across eight commercial office facilities, Irvine Company participated in multiple programs.
- Through AutoDR they participated with 3.2 MW and received $932,712 in incentives.
- They also participated in EE programs and received incentives of $432,687 for lighting and HVAC upgrades including control of these systems. In addition, Irvine Company made enhancements to their building envelope through Savings By Design. Over all, the company saved nearly 4.9 million kWh and 622 kW
- They have participated in Business Incentive Programs through third parties including:
  - Commercial Utility Building Efficiency (CUBE)
  - Monitoring Based Commissioning program (MBCx)

Eastern Municipal Water District

- Eastern MWD has implemented multiple energy efficiency projects totaling 7,882,483 kWh, 1,045 kW, and $290,388 for the projects implemented.
- They participate in Demand Response programs, AP-I, BIP, and AMP
  - Future implementation of Auto DR project to enable 3.3 MW of load shed in the AMP program
- Has received SGIP Funds over $2.7 million for Fuel Cells installed in two of their wastewater plants
- They have a 558 kW solar project underway and have received an additional $14 million for future projects
SDG&E Integrated Project Profile—Energy Assessment & Solutions

Customer Offering: SDG&E’s Energy Assessment & Solutions is the business customer’s single source for strategic energy analysis, delivering valuable insights about your electric use and savings tailored to their business. This new, added-value resource is available to all companies regardless of size, industry type or specific energy use. As part of the assessment phase, the most comprehensive ASHRAE (American Society of Heating, Refrigerating and Air Conditioning Engineers) Level 2 energy audit is performed by top-tier engineering talent at no cost to the company. An audit of this caliber typically costs $.10 to $0.15 per square foot and varies based on the complexity of the energy needs. The evaluation identifies the highest value demand response and energy efficiency measures to save the customer energy and money and pairs them with the right SDG&E offerings such as demand response rates or programs to reduce operating costs.

Program Statistics:

<table>
<thead>
<tr>
<th>Projects Completed</th>
<th>Project in Pipeline</th>
<th>Average Price per Sq. Ft.</th>
<th>Total Sq. Ft. Enrolled</th>
</tr>
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<tbody>
<tr>
<td>28</td>
<td>150</td>
<td>$0.07</td>
<td>16.5 Million</td>
</tr>
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</table>

Contactor Selection: An extensive RFP process was used to identify five of the highest-caliber engineering firms in San Diego. Criteria used to identify these firms included their ability to estimate savings accurately, knowledge of core programs to drive incentive and rebates, their reporting capabilities, and their drive to be successful with both their own business as well as their clients. By creating a tightly woven RFP-selected competition pool for the jobs, the pricing has been reduced to $.07 per square foot.

Successful Audit Q1:

<table>
<thead>
<tr>
<th>Project Name</th>
<th>kW Reduction* (ECM / EEM)</th>
<th>kW Dispatchable Load Shed** (ADR)</th>
<th>kW Reduction*** (DG)</th>
<th>kWh Reduction</th>
<th>Nat. Gas Reduction (Therms)</th>
<th>Water Reduction (kGal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Illumina</td>
<td>661.70</td>
<td>274.90</td>
<td>200.00</td>
<td>5,451,467.00</td>
<td>141,848.00</td>
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<td>Double Tree Hotel</td>
<td>209.00</td>
<td>93.40</td>
<td>-</td>
<td>963,989.00</td>
<td>24,421.00</td>
<td>-</td>
</tr>
<tr>
<td>Sanford Consortium</td>
<td>103.20</td>
<td>-</td>
<td>-</td>
<td>765,650.00</td>
<td>23,000.00</td>
<td>-</td>
</tr>
<tr>
<td>Morse HS - SD Unified</td>
<td>48.80</td>
<td>-</td>
<td>-</td>
<td>442,316.00</td>
<td>1,442.00</td>
<td>-</td>
</tr>
<tr>
<td>Tanabe</td>
<td>28.00</td>
<td>-</td>
<td>122.60</td>
<td>400,973.00</td>
<td>13,434.00</td>
<td>55.00</td>
</tr>
</tbody>
</table>

*KWh Reduction (ECM/EEM) is the permanent reduction of kW by a measure
**KWh Dispatchable Load Shed (ADR) is the temporary load reduction from an automated demand response measure
***KWh Reduction (DG) is the permanent reduction of kW by a Distributed Generation Measure
SoCalGas Integrated Project Profile—Multifamily Integrated Offering—Park La Brea

SoCalGas continues to roll out its single-point-of-contact approach to the multifamily segment in the City of Los Angeles. SoCalGas is partnering with LADWP to integrate natural gas, electric, and water offerings that are coordinated through SoCalGas’ new account executive serving the multifamily market. One of the notable facilities currently enrolled in this process is Park La Brea. Park La Brea is the largest multifamily property in California with 4,255 units (in 42 separate buildings) located in central Los Angeles.

SoCalGas finalized an IDSM audit report to Park La Brea in Q1 that identified natural gas and electric energy efficiency, solar thermal, and water efficiency opportunities, including:
- Replacing existing steam boilers with high efficiency domestic hot water heaters
- Installing solar thermal panels
- Replace antiquated 5gpm faucets
- Common area lighting upgrades
- Laundry facility updates
- Soil moisture sensors

SoCalGas is currently working with Park La Brea to implement some of the identified projects and help the facility get incentives and rebates from SoCalGas and LADWP programs, including Multifamily Energy Efficiency Rebates and On-Bill Financing for the installation of new high efficiency domestic hot water boilers. SoCalGas’ Emerging Technologies is also working with Park La Brea to plan for a case study project to install the latest ultra-efficient domestic hot water boilers with cogeneration capability.

Park La Brea Residential Complex in Central Los Angeles
**SW Integrated California Solar Initiative (CSI)** - The Statewide CSI program is offered to residential and commercial customers. The graph below shows the Q4 Solar programs by utility.

![IOU Solar Program Participation](image)

**PG&E**
General CSI: 376 residential and 81 non-residential projects have been completed in Q1 of 2014. New Solar Homes Program: 443 new homes have been completed and paid in Q1 of 2014. Multifamily Solar Homes Program: 12 low-income multi-family complexes have been completed in Q1 of 2014. Solar Water Heating Program: 30 residential, nine Commercial/Multi-Family projects and five Multi-Family Low-Income projects have been completed in Q1 of 2014.

**SCE**
In Q1 2014, the demand for Residential CSI applications remained high and the program budget for SCE was close to being exhausted. On March 17, 2014, SCE began a waitlist for residential applications that were later put on hold April 4, 2014. GM CSI received 4,823 residential applications in Q1 and 35 Non Residential applications. Currently, there is approximately $1.5 million left for residential applications and approximately $76 million for non-residential applications. SCE filed Advice Letter 3012-E with the CPUC to modify the allocation of remaining incentive funds. If approved, a portion of the non-residential funds would be moved to the residential sector. The AL was suspended on April 6, 2014. GM CSI continues to market the Non-Residential program in an effort to support the Preferred Resources Pilot.

**SDG&E**
The California Energy Commission’s New Solar Homes Partnership (NSHP) is part of the comprehensive statewide solar program known as the California Solar Initiative. The NSHP provides financial incentives and other support to homebuilders encouraging the construction of new energy efficient solar homes that save homeowners money on their electric bills and protect the environment. In Q1, there were eight customers who enrolled into projects representing 112 solar sites and 31 customers who were paid for their projects representing 153 solar sites.

**SoCalGas**
The Solar Thermal Program has 108 residential and 36 business projects enrolled.
Integrated Third Party Efforts

PG&E—CEI

The five large customer participants have all completed their kickoff meetings and are actively working through the CEI programmatic stages. The ten medium customer pilot is complete and we are currently reviewing the results.

SCE—CEI

The Commercial Cohort of seven customers has completed five workshops and the sixth workshop was changed to one-on-one meeting with participants to address various participants’ needs directly. For Industrial, there are nine customers currently involved with one-on-one engagements. For the water cohort recruiting has been slow, but we currently have two agencies that have agreed to participate. We are working directly with BCD to present the program to AEs and other agencies to enroll. For Agricultural, two customers were recruited during the World Ag Expo held in February and signed MOUs and we are currently working on change order to increase vendor the purchase order to begin implementation.

2013-14 EM&V Research Studies

A kickoff meeting for the statewide IDSM IOU-led study “Market Assessment for Commercial and Residential DSM Markets” was held on January 8, 2014. The contract is held by San Diego Gas & Electric on behalf of the Joint Utilities who has contracted with the Evergreen Economics Consulting group for purposes of conducting the study and developing a report.

The meeting attendees: Lonnie Mansi, Rob Rubin, Reggie Wilkins, Loan Nguyen, Mark Martinez, Lisa Paulo, Christie Torok, Steve Grover, Helen Arrick, Rachel Sackman.

Meeting action items included:

- Investigate PPM data—what is available currently and where to obtain
- Find the customer size parameters for the commercial online integrated audit
- Determine the portion of the CSS/CMST sample that fits in the appropriate size range
- Organize a conference call for program managers to provide input and feedback

In addition, in support of the study, in February and March the Joint IOUs provided Evergreen Consulting a list of IOU interview candidates in support of the study. In particular, the interviews would support an examination of the available IOU tracking data to identify trends in IDSM interest and uptake in the residential and small commercial markets. These interviews should conclude in Q2.
Directive 6: Regular Reports

The Task Force reviews integration activities and tracks results through statewide meetings and formal reports to the CPUC. The reports can be found at [http://eega.cpuc.ca.gov](http://eega.cpuc.ca.gov).

In compliance with Directive 6, the SW IDSM Task Force will continue to submit quarterly reports to the Energy Division highlighting the IOUs’ IDSM accomplishments. Below is the table of dates for the Quarterly reports for the 2014 program year.

<table>
<thead>
<tr>
<th>2014 Report Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joint IOU Integrated Demand Side Management Quarterly Summary and Compliance Tracking Report</td>
</tr>
</tbody>
</table>

Directive 7: Internal Teams

The IOUs have internal integration teams that meet monthly or on an as-needed basis with IOU staff from EE, DR, DG/CSI, ESAP, Marketing and Delivery channels, such as utility account representatives, and Third Party/Government Partnerships.

In compliance with Directive 7, the IOUs have developed internal utility Integration Teams. The Q1 details of the IOU SW Integrated Team meetings are in the Excel Tracking Sheet Q1 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tab 21 for the SW Integrated Team information.
Directive 8: Integrated Marketing

The Task Force tracks, reports and shares best practices related to local integrated marketing campaigns for residential and business customers.

Details on the Q1 IOU Marketing for business and residential are outlined in the Excel Tracking Sheet Q1 2014 Joint IOU Tracking Sheet 5_1_14.xlsx Tabs 22-29 for the individual IOU’s detailed marketing information.

PG&E
Residential

- **SmartRate Retention Series**: Goal: The more that customers learn to conserve energy the more they will save on SmartRate and stay enrolled in the rate plan. Description: A series of emails or direct mail postcards are sent to customers. The communications includes tips on saving energy as well as one that encourages them to take an “energy check-up” online. The “MyEnergy” online tool provides tips to customers on saving energy that are personalized to their household. In addition, “MyEnergy” suggests to customers the best rate based upon their past year’s energy usage.

- **SmartAC Home Energy Reports Marketing Module**: A SmartAC marketing module was included in outgoing Home Energy Reports to encourage customers with high usage in hot zip codes to consider the SmartAC program. Home Energy Reports include energy saving tips as well as EE, DR, and rate options.

- **SmartAC Cross-sell to SmartRate Customers**: SmartRate customers can automate their savings by signing up for PG&E’s SmartAC program. SmartAC automatically cycles the air conditioner during Smartdays and during power emergencies. SmartRate customers without SmartAC in hot zip codes receive a promotional letter and a follow-up telephone call to encourage them to sign up for SmartAC. After installation, the customer receives $50.

- **ESA Acquisition Campaign**: Multi-channel, multi-touch acquisition campaign targeting approximately 120,000 ESA-eligible customers running March through April 2014.

- **CARE High Usage Campaign**: Post enrollment verification mailed every month to approximately 5,000 CARE participants identified as high energy users (400 percent above baseline) with detailed instructions on how to fulfill new CPUC requirements to continue receiving the CARE discount. This effort started in July 2013 and will continue on a monthly basis. The goal is to reduce operating costs, remove ineligible customers from the program, and provide subsidy to truly qualified customers.

1. **Join**.
   Change when you use energy and pay less for it.
   - With the SmartRate Plan, your SmartSaves device will automatically help you save money on your energy bill. SmartSaves will reduce your energy bill or reduce your usage during peak intervals.
   - SmartSaves will reduce your energy usage during peak intervals.
   - SmartSaves will reduce your energy bill or reduce your usage during peak intervals.
   - SmartSaves will reduce your energy usage during peak intervals.
   - SmartSaves will reduce your energy bill or reduce your usage during peak intervals.

2. **Manage**.
   Here’s how the SmartRate Plan works:
   - SmartSaves will reduce your energy usage during peak intervals.
   - SmartSaves will reduce your energy bill or reduce your usage during peak intervals.
   - SmartSaves will reduce your energy bill or reduce your usage during peak intervals.
   - SmartSaves will reduce your energy usage during peak intervals.
   - SmartSaves will reduce your energy bill or reduce your usage during peak intervals.

3. **Save**.
   The bottom line — small changes can save you money.
   - You don’t have to give up energy-intensive activities to decrease your energy usage.
   - SmartSaves will reduce your energy usage during peak intervals.
   - SmartSaves will reduce your energy bill or reduce your usage during peak intervals.
   - SmartSaves will reduce your energy bill or reduce your usage during peak intervals.
   - SmartSaves will reduce your energy bill or reduce your usage during peak intervals.

FAQ

**SmartTips**

**How will I know if it’s working?**

When you manage your energy use effectively between 11 a.m. and 7 p.m. on Smartdays, you’ll see the difference during the season. If you save less than 11 Smartdays in a month, you’ll be paying the discounted rate for the entire bill.

**How will I know it’s a Smartday?**

On the business day prior to the Smartday, we will notify you by text message. If you sign up for your monthly metering fee, you will receive an email or text each week with your Smartday metering fee.

**What if I have questions?**

For help with additional questions about the SmartRate Plan, go to www.smartrate.com or call 1-888-SMARTSPEAK (1-888-762-7877) or email SmartRateService@pgandelectric.com.
Business

- **Event Days Matter DM: (March 2014):** Direct mail sent to SMB customers (~100K SAs) who will transition to a Peak Day Pricing rate in November 2014. This piece educates customers about Peak Day Pricing, why event days matter to their business and outlines PG&E resources that can help them prepare and make an informed decision about enrolling or opting out early.

- **SMB Peak Day Pricing Early Enrollment DM (March 2014):** Direct mail sent to ~100,000 SMB time-of-use customers (SA IDs) scheduled to transition to Peak Day Pricing (PDP) in November 2014. The campaign provides information about Peak Day Pricing and the benefits of the program. Three versions of the mailer (savers, non-savers, contingent savers) that direct customers to a website, pgePDP.com where they enter a personalized code to obtain additional program information that is specific to their business and are encouraged to make an early decision (enroll or opt-out) regarding PDP. Customers who enroll will be transitioned to PDP prior to the 2014 summer season. Customers who opt-out will be removed from the November 2014 transition.

- **Seasonal Rate Change DM and bill insert (March-April 2014):** Direct mail and bill insert sent to SMB customers who transitioned to time-of-use in Nov 2013. Message reminded customers that summer time-of-use (TOU) rates are beginning in May 2014 and directed them to My Energy to view their energy usage and rate options or to the Business Energy Checkup for additional ways to save.

- **Time Matters DM and bill insert (Feb-Mar 2014):** Direct mail postcard and bill insert reminding SMB customers scheduled to transition to time-of-use in 2014, that TOU rates are beginning in November 2014 for the next phase of SMB customers and directs them to My Energy to view their energy usage and rate options and to go on pge.com to learn more about time-of-use rates.

- **Rate Analysis DM (January 2014):** Direct mail piece sent to Small and Medium Agriculture customers (5,500 SAs) informing them of their transition to a TOU rate in March 2014. PG&E is required to provide these customers with a rate analysis so they understand that they have rate choices and what the potential financial implications are for each choice. This piece guides customers through the step by step process of signing in to My Energy (or signing up) to conduct a rate analysis, see their rate options, and determine the right rate for them. The intent is to make the analysis process as easy as possible for customers.

- **Industry Engagement:** Staffed and hosted booth at eight industry events: Unified Wine Symposium, Colusa Farm Show, World Ag Expo, California League of Food Processors, AgSafe, California Citrus Showcase, Western United Dairymen, and Salinas Valley Ag Technology Summit. Presentations were given at the World Ag Expo & CLFP events.

- **High Touch:** Invited and hosted farmers and food processors to five integrated workshops held across the state. Each workshop was custom to the local audience.
• **Expanded outreach:** PG&E's network of Ag experts are being invited to present on EE and Drought at an expanding number of conferences and workshops that are hosted by industry groups.

• **State and Federal Government:** We are actively engaged with several agencies in local counties that are associated with the Ag industry. They are learning about the ISDM support PG&E offers to farmers and are integrating our content into their work.

• **PG&E's Energy Advisor for Business ENewsletter:** Timeframe: Year-round, monthly. Description: Sent to all small and medium commercial customers for whom we have an email address (approx. 70K); new signups received weekly through www.pge.com/EnergyAdvisor. Features PG&E's latest news and tools for businesses, including topics such as: Time-Of-Use, My Energy, energy assessments, seasonal savings tips, rebates, case studies, emergency preparedness, solar offerings and lots more.

• **Business Energy Reports:** Business Energy Reports launched its alpha and beta pilots to 15,000 small to medium sized business customers. Similar to Home Energy Reports, customers will initially receive three reports monthly followed by four additional reports bi-monthly for a total of seven over 12 months. The reports contain customized usage comparison and estimated end-use breakdown based on business type, size and area, and also month-over-month energy usage performance tracking. Focused savings ideas prioritized by the customer's top end-uses and seasonal considerations. Personalized energy recommendations including PG&E rebates and behavioral tips. Lastly, targeted marketing to promote PG&E programs including On-Bill Financing, HVAC QM, Peak Day Pricing, MyEnergy, eBills, and Business Energy Checkup.

• **Industry Engagement:** Participated in the SPE Health, Safety and Environmental conference.

• **Advocacy for SMB:** Sent to 55k small and medium business customers. Customers are asked to write a story about how PG&E helped them save energy and money by using one or more of our services (i.e. energy audits, rebates/incentives, rate options, DR, DG, etc.). After a customer writes a story, they are asked to share it with their network via email or social media. The end result is a positive story about PG&E sent to an audience that we may or may not have a deep connection with, yet that has a call to action to get engaged in energy management.

• **Industry Engagement:** Staffed and hosted booth at nine tradeshow events for a wide range of Ag industries, including Unified Wine Symposium, Colusa Farm Show, World Ag Expo, California League of Food Processors, AgSafe, California Citrus Showcase, Western United Dairymen, Sonoma County Ag Days, and Salinas Valley Ag Technology Summit.

• **High Touch:** Completed five Ag workshops that focused mostly on Energy Efficiency and Irrigation (pumping and water delivery).

• **High Touch & Impressions:** We continue to have a large pavilion at the World Ag Expo of Tulare. Focus was on the drought and supporting farmers with testing and repairing pumps along with the efficient use of water and energy. There are 300,000 impressions and 31,000 engagements this year, which represents a 40 percent increase over last year.

• **Savings by Design:** Emailed and posted newsletter to design architects on "Evolution of LEED v4."
SCE Residential
Offer Management Pilot

SCE is evolving its marketing efforts from a mass-market approach to a more relevant program and services customer engagement customer relationship approach. In 2013, SCE conducted an offer management pilot program that initiated a personalized, 1:1 marketing approach. Through this offer management pilot, SCE developed a contact strategy for 200,000 residential customers who recently enrolled in specific programs (Summer Discount Plan, Save Power Day Alerts and Budget Assistant) and optimized their customer experience with the appropriate, personalized, follow-up communications. Specifically:

- **0-30 days**: In the first 30 days since a customer enrolled in the previous program, the offer management pilot delivered a “Thank You” communication to confirm the program enrollment for the customer and provide tips on how to get the most out of that program.

- **30-90 days**: Between 30-90 days after enrollment in Summer Discount Plan, Save Power Day Alerts, or Budget Assistant, the pilot delivered communications to customers to provide them with additional tips on that program, as well as related offers, or “next best offers.” These offers were personalized to the individual and were based on business rules as well as analytical modeling of what a customer would be most likely to enroll in next.

- **90+ days**: 90 days after enrollment in the previous program, customers in the offer management pilot began to receive offers without tips. These communications focused on the next best offer for that customer. Ideally, customers would take this next best action and enroll in another program or service, and would then restart this offer management customer experience.

The offer management pilot was an integrated DSM marketing approach that promoted the following programs, based on analysis of what the individual customer should receive:

- Summer Discount Plan
- Save Power Day Alerts
- Budget Assistant
- Appliance Recycling Program
- Home Energy Efficiency Rebates
- Energy Upgrade California
- My Account
- Online Billing
- Online Payment
- Direct Payment
- Home Energy Advisor
- Electric Vehicle Rates

Offer management pilot activities consisted of direct mail and email starting in Q4 of 2013. The pilot ended in Q1 of 2014, having proven the concept that targeted, personalized, and timely communications would be more effective in delivering programs and services enrollment. Incremental lift from this approach was between 15-20 percent higher than the previous approach.
Business
TOU
In Q3 and Q4 of 2013, SCE focused on educating customers on the TOU transition through targeted education and outreach efforts. As of January 2014, these very same customers started transitioning to TOU rates. We are now in the Aftercare phase with these customers as we continue to educate them about their new rate and the different solutions, tips and tools that are available to them to help them better manage their costs. In Q1, we have deployed several online and offline tactics to help promote our DR offerings. In addition, on April 3, 2014, we launched the First TOU Bill Campaign where all TOU transitioned customers were sent a letter to remind them that they are now on TOU along with targeted energy solution (e.g. My Account, Budget Assistant, Summer Discount Plan, Demand Bidding Program, Rate Analyzer, Industry specific EE tips) offerings.

AgExpo
On February 11-13, 2014, SCE exhibited to over 100,000 attendees from the Agriculture Industry at the 2014 International World Ag Expo in Tulare, CA. Our primary focus involved performing an on-site rate analysis for our business customers to help shift TOU benefactors over before the mandatory switch in 2015. This in-depth rate analysis also provided the opportunity to discuss applicable IDSM solutions for their business. Other topic focus also included Agricultural Safety Around Power Lines, Distributed Generation, SCE Pump Tests, and the opportunity to learn more at our Energy Education Center—conveniently located across the street from the event. Over the three-day event, our efforts allowed us to interact with over 7,600 SCE Customers about a variety of DSM solutions.

Amy Olson, SCE account executive, speaks with a customer during the recent Ag Expo.

Nick Henschel, SCE technical specialist, speaks with customers about SCE’s free pump tests during the recent Ag Expo.
SDG&E Residential Marketing
“Extra Help When You Need It” educational booklet. Provides an easy to understand cross-reference to other energy efficiency programs and is provided to all ESAP participants. To further support SDG&E’s diverse customer base, this booklet is also available in Spanish.

Whole House Brochure. A comprehensive brochure that promotes Energy Efficiency Rebates, Demand Response and Distributed Generation programs along with the My Energy Survey and our Energy Management Tools.

Residential Outreach
SDG&E proactively engaged with customers in Q1 by providing awareness of SDGE’s energy efficiency, demand response and customer assistance programs while encouraging customers to sign-up for tools and services that can help them track their energy usage and spending in the future. A variety of communications channels were utilized to reach SDG&E’s diverse customer base, providing information on IDSM programs and services to help our customers save energy.
Small and Mid-Size Business Marketing

During Q1, 2014, SDG&E launched a new campaign targeting small and mid-sized business customers. The campaign’s objectives focus on providing proactive, holistic solutions to help mitigate the impact of rising energy costs. To that end, SDG&E has consolidated and simplified our business offerings and packaged various communication tactics within the campaign theme “Good4Biz.” Our goal is to help businesses manage their energy use and save money on their bills with a stepped approach that encourages greater engagement and drives participation in energy-efficiency, demand response and time-of-use rate programs. The “4” represents our four solutions: Expert Help, Personalized Tools, Financial Incentives, and Billing Options. The campaign runs through the end of the year and will include television spots, online advertising, a dedicated microsite at www.sdge.com/good4biz, on-air interview segments, a customer recognition program, print advertisements, direct mail (letter and mailers) and marketing collateral.
Business Outreach Solutions
During Q1, SDG&E continued our successful Business Seminar Series with a “Water and Energy Management” seminar focused on strategies to reduce the use of water and energy, while highlighting successful comprehensive projects in the region. Fifty-one attendees heard from Encina Wastewater Authority, Helix Water District, and the City of San Diego, who participated as panelists with presentations of their successful projects. Other presentations covered how to implement energy-saving measures to help lower budgets without sacrificing commitment to quality.

Also this quarter, SDG&E’s Major Customer Advisory Panel (MCAP) meeting was held at Qualcomm’s Q-Add facility. Attendees heard about impending rate changes while touring Qualcomm’s new facility and co-gen plant. Members were taken on tours of the facility led by senior engineering and architectural staff.
SoCalGas Business
The World Ag Expo is an event in which SoCalGas has participated for the last several years. Over its three-day time span, the World Ag Expo hosts over 100,000 visitors. This is an event where the agricultural industry comes together in a big, big way! The event includes tractor races, dozens of exhibitors and the best community food stands. The SoCalGas 30’x50’ booth welcomed thousands of visitors where we were able to share information on our Energy-Efficiency, Customer Assistance, Solar, EUCA, Biogas, NGV, AMI and other programs. Customers were particularly interested in the EE Starter Kit information and completed forms to obtain one by mail (per eligibility). Other IOUs (PG&E and SCE) also had a separate presence at this event.

Residential
The Asian American Expo is an event in which SoCalGas has participated and supported for the last several years. The event is a celebration of Asian culture and community and offers a number of performances, food vendors and other exhibitors. It hosts over 75,000 attendees and over 100 exhibitors. Attendees are primarily of Asian backgrounds, most of whom are Chinese. It was a successful event overall, and our participation included highlighting the Solar, Customer Assistance, Energy-Efficiency and EUCA programs. SoCalGas had a 10’x10’ booth and provided collateral and promotional items to booth visitors. Thousands visited our booth over the course of that weekend. We discovered that the attendees at this event were particularly interested in Customer Assistance and ways to save with energy-efficient behaviors.