

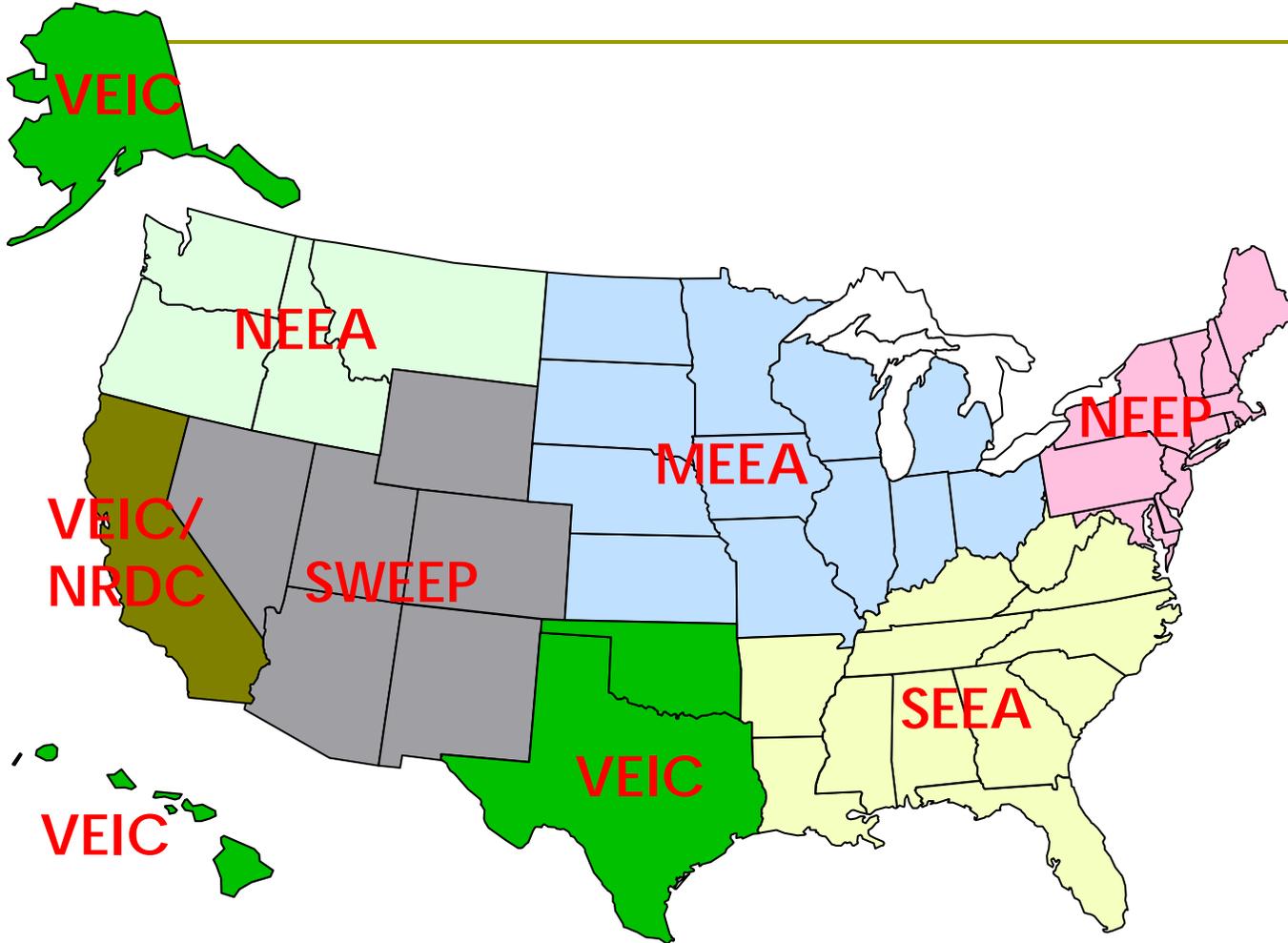
Utility Partnering

Curtis Framel
SW Energy Efficiency Project



www.swenergy.org

Who We Are: Team 4



ACEEE, NRDC: National Support



Provider Network Resources

State and Local Capacity Building	<ul style="list-style-type: none">• Trainings• Workshops• Peer-to-peer matching
Technical	<ul style="list-style-type: none">• Renewable energy siting and development• Review of technical specs for RFPs• Strategic planning, energy management, and conservation strategies• Green building technologies• Building codes
Program Design and Implementation	<ul style="list-style-type: none">• Policy and program development• Coordinating rate-payer funded dollars with ARRA projects and programs• Sustainable community and building design• State and regional EE and RE assessments and planning• EE and RE portfolio program design elements
Financial	Program design support and guidance on financing mechanisms such as: <ul style="list-style-type: none">• Revolving loan funds (RLFs)• Property-assessed clean energy (PACE)• Loan loss reserves and enhanced credit mechanisms
Performance Contracting	<ul style="list-style-type: none">• Designing and implementing a performance contract• Leveraging private investment• Reducing institutional barriers• Tracking and comparing programs

Importance

- ❑ What will become of the estimated 675,841 jobs created from ARRA, when funding ceases to flow?
- ❑ What will become of the ARRA funded programs, what will be their legacy? Will effective energy efficiency programs simply shut down when funding stops?
- ❑ What plans are in place for communities to continue efforts originated by ARRA funding?

Utility Demand Side Management Programs

- ❑ One important strategy to continuing the success of EECBG funded programs is to partner with utility DSM programs.
- ❑ This new funding source comes with a unique set of challenges and performance requirements.
- ❑ Our Utility Partnering effort aims to provide guidance to help grantees bring this strategy to fruition.

Develop a Plan

Draft a written data reporting plan that is acceptable to both the utility and the grantee; Avoid confusion from the start

- Identify specific data requested by Grantee
- Determine data access options; web base or customer service
- Specify data formatting and how data is to be communicated
- Identify utility contact and grantee contact responsible for data reporting
- Outline customer data privacy and release requirements
- Identify DSM opportunities and process to sharing projects
- Determine how data will be stored and maintained by Grantee
- Identify any parties that would have access to this data

Meet the Utility



- ❑ Identify problem resolution path; How to report / Who to contact
- ❑ Course of action if urgent data request is needed
- ❑ Course of action for delay in release of customer data report from Utility representative; Identify optional data reporting process
- ❑ Identify process to address customer privacy concerns or questions
- ❑ How can Grantee leverage utility DSM offerings?
- ❑ Identify DSM processes; project approval, reporting,

Problem Resolution

- Move up the foodchain to resolve problems;
 - If the plan's off track, meet with stakeholders to build corrective action
 - Serious problems? consider regulatory or consumer advocate approach

- Meet in person to resolve key problems
 - Face to face meetings are key to developing utility relationships

- Schedule occasional conference calls to check in;

- Maintain lines of communication
 - Recognize utility efforts to share customer data/ Update grantee achievements
 - Recognize what's working as well as what's not working

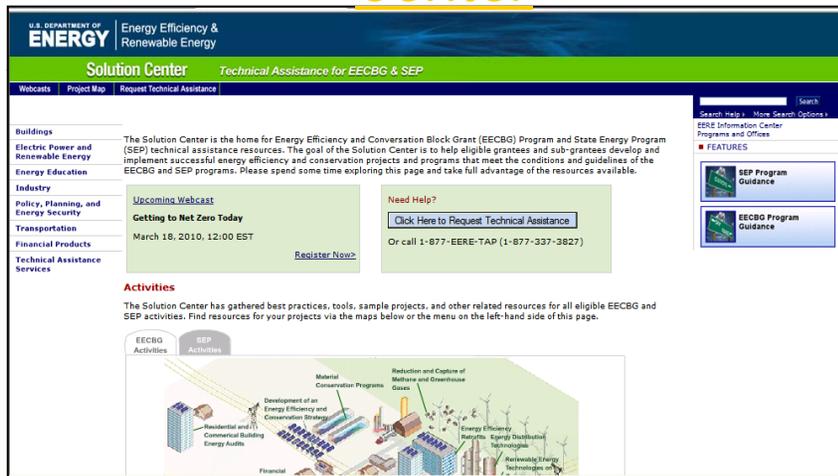
2011 TEAM Delivery Utility Tools

- Case Study
 - Helps to identify and outline best practices
- Webinar A
 - Review of cost effective program design, improvements, processes and stakeholders.
- Webinar B
 - Review of utility TRM screening tools, program evaluation processes, data tracking/reporting
- Guidebook
 - Guide to procuring utility DSM funding

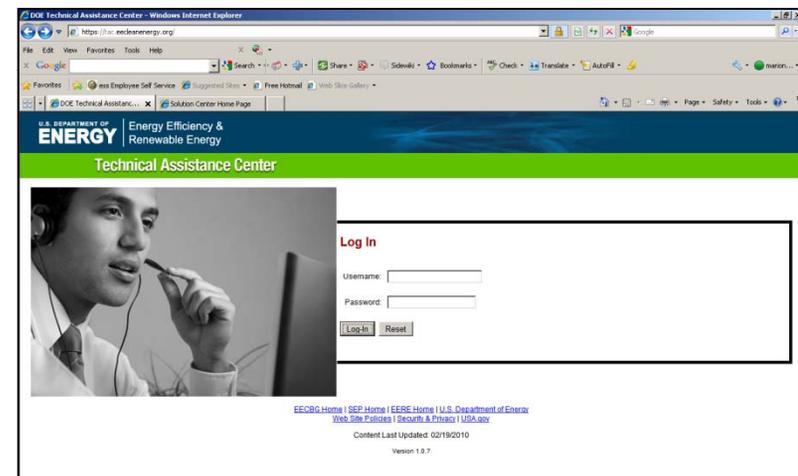
Accessing TAP Resources

We encourage you to:

1) Explore our online resources via the [Solution Center](#)



2) Submit a request via the [Technical Assistance Center](#)



3) Ask questions via our call center at 1-877-337-3827 or email us at solutioncenter@ee.doe.gov

INTRODUCE



SPEAKERS