Monday, February 17, 2020

11AM – 6:30PM  
**Registration Open** – Marquis Center Registration Counter

8AM – 3:30PM  
**Pre-Conference Training (extra fee)**  
*Customer Engagement – How to Get Your Customers to Say YES!*
Trainers: Laura Orfanedes, ICF and Deanna Peiffer, ICF

*Beneficial Electrification Workshop: Building a Framework and Roadmap that Helps Customers, The Grid, and the Environment (FOR UTILITIES ONLY)*  
Trainer: Bill LeBlanc, E Source

12:30 – 2PM  
**Energy Awards Luncheon (by invitation only)**

3:45 – 5PM  
**UtilitiesConnect (for Utilities only)** – Platinum 2  
Facilitator: Lon Huber, Duke Energy  
We will discuss impactful trends shaping the industry. Learn how this current period of change creates both challenges and opportunities for utilities. Work together with your industry colleagues to brainstorm win-win outcomes and innovative solutions that meet customer and company expectations.

3:45 – 5PM  
**Professional Development: Negotiation Skills** – Platinum 3  
Facilitator: Nancy Fox, Negotiation Fox  
Come to this interactive workshop to learn how to negotiate throughout your day, both in your personal and professional life. You will learn a negotiation method that produces the best outcome for both sides AND preserves your relationship with the other party for a win-win. Attendees are encouraged to participate and will leave with the confidence and knowledge to consider negotiation a useful skill instead of something to avoid.
Monday, February 17, 2020 – continued

5 – 5:30PM  Pathway to New Professionals & Poster Presentations – Marquis Ballroom
If you are new to the industry, this is where you get to meet others just like yourself. Begin the conference by making industry connections here! Learn about new trends, topics and technology through your peers’ poster presentations that were especially selected by our judges for this event.

Poster Topics:

Increasing behavior-based conversions through nurture messaging
Meghann Goddard, Franklin Energy

Smart Thermostats in Lower Income Multifamily Buildings
Rebecca Mellino, Magrann Associates

Gamification
Nicole Hendrickson, Baltimore Gas and Electric

An Assessment of Key Delivery Practices for Large C&I Program Success
Ryan Collins, ERS

IoT: Internet of Threats?
Melissa Kosla, ADM Associates

Autopilot - The Utility Way
Stephanie Knight, Apogee Interactive

Low Income Strategies for School Kit Programs
Chris Reilly, National Energy Foundation (NEF)

Artificial Intelligence (AI) Solution Drives 38% Energy Savings Reduction in Plug Loads
Jennifer Tsau, Keewi Inc.

After this event, the posters can be viewed for the duration of the conference inside the Expo Hall.

5:30 – 7PM  Opening Reception in Expo Hall – Marquis Ballroom
Food, drinks, networking and the Expo Game – play to win valuable prizes in Tuesday night’s drawing. ($3000 value!)
Tuesday, February 18, 2020

7AM – 5:30PM  Registration Open

7 – 8AM  Networking Continental Breakfast in Expo Hall – Marquis Ballroom

8:15 – 9:30AM  Opening Plenary – Platinum 5-10

Welcome and Opening Announcements
John Hargrove, AESP

Chair remarks, Gavel Exchange
Bill Norton, Opinion Dynamics
Raegan Bond, Dunsky Energy Consulting

Welcome Remarks from Host Utility
Katie Sloan, Director of eMobility and Building Electrification, SCE

Introduction
John Naughton, COO, EFI

Collecting Dots. Connecting Dots. Get on the Path to Innovation
Keynote speaker: Bill Stainton

The energy efficiency industry has accomplished many amazing things over the past 30 years. The big question now is, what can we accomplish over the NEXT 30? The challenges we face in energy services require innovative solutions. But how, exactly, do you find them? How do YOU become the person who comes up with the breakthrough idea? In this program, 29-time Emmy award winner Bill Stainton breaks it down into just two easy steps: Collecting Dots (the raw ingredients of innovation) and Connecting Dots (where the real magic happens!)

9:30 – 10:15AM  Networking Refreshment Break in Expo Hall – Marquis Ballroom

30 for our 30th
Be on the lookout for gift card awards throughout the conference, with value from $50 to $500!
**Tuesday, February 18, 2020 – continued**

10:15 – 11:30AM  **Session 1A: DER Storage – Grand Ballroom Salon E**

**Moderator: Ian Metzger, TRC Companies**

**Using Data and Modeling to Avoid DER Challenges**

**Speaker: John Dirkman, Nexant**

DER programs are challenging because the stakes are higher. Their efforts can make or break the reliability, cost, and safety of the electric grid. As a result, DER program designers must avoid potential DER challenges, including thermal overloading, voltage swings, and the failure of customers to deliver distributed generation as promised. Learn about potential DER challenges and hear about the data and modeling required to identify and avoid them. The speaker will give examples from two pilots: a substation being affected by high solar penetration in America, and a utility using storage to offset electric vehicle impacts in Europe.

**Harnessing the Power of Behind-the-Meter DER**

**Speakers: Stephan Barsun, Itron and Brad Mantz, Sempra Utilities**

One of our industry’s most pressing challenges is over-generation from renewables. The concerns of load volatility and grid instability are steadily increasing; however, the power of behind-the-meter distributed energy resources (DER) can be harnessed to manage these critical issues, while enabling the grid of the future. New DER management technologies, tariff structures, and early adopters provided a real-world lab of 100 homes to improve the cost management of electricity usage while diminishing grid volatility. Learn how the California Energy Commission-funded Smart Home Study tested this approach. We will outline the goals of the project, review implementation challenges, and provide initial results.

**Lessons Learned from an Energy Storage Program**

**Speaker: Ari Michelson, ERS**

The Advancing Commonwealth Energy Storage (ACES) program, sponsored by the Massachusetts Clean Energy Center and the Department of Energy Resources, awarded $20 million across 26 energy storage demonstration projects throughout Massachusetts in 2017. These 26 projects showcase both behind-the-meter and in-front-of-the-meter deployments, testing a wide variety of storage use cases including demand charge management, frequency regulation, demand response, and power factor correction. Join this session to obtain an insider’s view on ACES’s progress so far, including successes and challenges encountered throughout the project development and interconnection processes.
EE as a Catalyst to Achieve Hawai‘i’s 100% Clean Energy Mandate

Speaker: Brian Kealoha, Leidos

Hawai‘i Energy’s programs have historically focused on energy efficiency. With the rapid acceleration of storage, photovoltaics, and electric vehicles, the programs had to evolve into a grid resource in order to achieve the state’s 100% clean energy mandate by 2045. Learn how Hawai‘i Energy is delivering non-wires alternatives to reduce grid issues created from the high penetration of intermittent and distributed renewable energy.

Session 1B: Pay for Performance: Design Options to Optimize – Grand Ballroom Salon F

Moderator: Carmen Best, Recurve

P4P – Find Innovative Ways to Reach Customers
Speaker: Emily Levin, VEIC

While the pay-for-performance (P4P) concept is still new for many utilities across the country, it is quickly becoming an attractive option to enhance the cost-effectiveness and overall performance of program portfolios, as well as address grid reliability challenges and gas pipeline constraints. Come to this session to learn innovative ways to reach customers and value efficiency as a system resource with lessons learned from pilot programs.

Parallel Performance: Lessons Learned from North America’s First Full-Scale DSM P4P Program
Speakers: Jake Fuller, EcoMetric Consulting and Kimia Yeganeh, CLEAResult

In recent years, many prominent C&I energy efficiency programs have shifted towards pay-for-performance for a variety of reasons, including cost-effectiveness and reduced risks. Ontario has been successful in this shift. Obtain lessons learned from two players in Ontario’s P4P program structure. Gain insights on program design/redesign to a P4P structure and data-driven evaluation methods. With program delivery and evaluation both represented, the speakers will discuss how they work together to better understand what is driving savings performance in the P4P model so the audience can replicate it to meet their own conservation goals.

Pick the High-Hanging Fruit: How P4P Programs Can Drive Savings
Speaker: Mathew Gard, ERS

Tired of the same old, widget-based or custom calculated programs? Want to try something new but can’t justify the risk? Pay-for-performance or pay-as-you-go programs allow utilities to increase and expand the performance of custom-calculated programs to include measures with higher levels of uncertainty or unknown persistence. Come hear the advantages of such programs and learn how they are implemented, including key differences in the measurement and verification process compared to a single-payment program. The speaker will also review how the pay-as-you-go program increased the success of a data center program located in the heart of Silicon Valley.
### Session 1C: Marketing Messaging – OC Ballroom Salons 1-2

**Moderator:** Cindy Gage, C+C

**Just Because You Can Doesn’t Mean You Should**
**Speaker:** Cindy Sargent, Brainspur

You’ve got so much to say and just one marketing campaign or ad to do it in. Plus, you’d better get your money’s worth, right? But in attempting to cover all the bases and leave no stone unturned, you can quickly complicate your message, confuse customers and give them less reason to care. Come to this session to hear why adding content doesn’t mean adding value. The speaker will also provide some compelling examples and explain how telling your story with a few simple elements, that focus on a single key message or strategy, will resonate more deeply, driving success and customer satisfaction.

**How UX Drives Customer Engagement**
**Speaker:** Megan Nyquist, Franklin Energy

The way we make our customers feel determines the success of our programs. Outdated user experiences, common in many utility websites and other customer-facing technology in our industry, can thwart our best intentions when it comes to customer engagement. In short, if we’re not prioritizing user experience (UX), we’re probably ignoring customer satisfaction, and in the long run hurting the engagement in, and success of, our grid optimization programs. Come learn practical ideas from experts in product design, user experience testing, and digital marketing that can be immediately applied to your programs to improve user experience.

**New Life for Declining EE Programs**
**Speakers:** Jason Turner, ID Lab Global and Thac Nguyen, DTE Energy

Residential programs, products and services can stagnate and lose their once strong results. Developing all-new programs to offer customers is costly, risky and can take a lot of time to become effective. Instead, what if you could breathe new life into your current programs? Learn how one utility overhauled one of its residential energy efficiency programs, how winning messaging was created, and how using once perceived “risky” imagery produced profoundly better results. Leave this session knowing how they did it and how to do it yourself!

### Session 1D: Professional Development: Digital Networking – Platinum 1-2

**The Evolution of Networking: Now and in the Digital Age**
**Speaker:** Laura Schauer, ILLUME Advising

Even in an ever-evolving space of digitalization, LinkedIn, and rapid communication, the art of networking is becoming increasingly important. What is the most effective way for engaging with people? What are the best questions to ask when first meeting someone? (You might be surprised!). How do you close conversations in a way that will keep the door
open for the future? Become a fearless networker! The speakers will impart the benefits of networking while engaging with each other to learn to be more comfortable, and better, at networking (both in-person and virtually). Leveraging instructor-led guidance and peer-to-peer practice, you will walk away from this session with practical tools and tips that you can apply throughout the conference and beyond.

11:30AM – 1:15PM
Networking Lunch in Expo Hall – Marquis Ballroom

Noon – 1PM
Chapter Lunch Meetings
Northeast – Elite 2
Canada – Elite 3
Southwest – Gold Key I - II
Midwest – Elite 1

1:15 – 2:15PM
Session 2A: Data/AMI (Panel) – Grand Ballroom Salon E

Moderator: Daniel Jarvis, DNV GL

Two Faces of Data Analytics: Utility and Customer Use Cases
Panelists: Jolyn Newton, Tennessee Valley Authority; Joseph Wadel, Consumers Energy; and Bill Clemens, DTE Energy

Data isn’t useful until it can be turned into knowledge. Learn what a select group of utilities are doing with their gigabytes of available data to help create customer value, increase program efficiency, better predict outcomes and stay ahead of the rapidly changing energy marketplace. Hear three perspectives on solutions to challenges that were created through the effective mining and analysis of readily available utility data. Each panelist will present the problem to be solved, the data that was used to solve it, and the end-product solution with a focus on transferrable insights.

1:15 – 2:15PM
Session 2B: iDSM Cross-cutting – Grand Ballroom Salon F

Moderator: Sharyn Barata, Opinion Dynamics

Making iDSM Truly Integrated
Speaker: J.J. Vandette, VEIC

What does successful integrated demand-side management (iDSM) look like? Understanding flexible load management is a key learning objective and will be the jumping off point to explore these topics:

• Hear about the results from an IDSM initiative involving utilities, SaaS companies, and efficiency programs

• Understand the role of and potential for SaaS companies and distributed energy resource management system (DERMS) providers in reducing your peak-related costs through automated demand response (Auto-DR)

Consider how your energy efficiency program design might need to change in light of these new players in order to successfully measure and evaluate iDSM.
**iDSM & Potential Studies: NOT the Sum of Its Parts**  
*Speaker: Philippe Dunsky, Dunsky Energy Consulting*

We all know it—it’s time to break out of our silos and move to an integrated approach to DSM (or DERs). But doing so is harder than it seems. Hear why integrated demand-side management (iDSM) is so important to effectively accelerate the clean energy transition, and why “potential studies” – the assessments that tell us what is achievable – need to take a more integrated approach. Learn how the speaker’s own firm’s potential study modelling is moving to account for critical interactions between EE, DR, PV, EV and other Demand-Side Energy Resources.

**The Promise and Progress of Integrated EE and DR Programs**  
*Speaker: Dan York, ACEEE*

The rapid growth of distributed energy resources (DERs), which include energy efficiency (EE) and demand response (DR), is transforming the electric utility industry. Program administrators typically have approached and implemented EE and DR programs separately. While the benefits and value of integrated EE/DR programs have long been recognized, ACEEE’s recent research shows that most customer programs still are not integrated. Learn about the landscape of integrated EE/DR programs in the US including how successful programs have overcome challenges to achieve desired outcomes.

**Customer Journey Mapping in Practice at Ameren Missouri**  
*Speakers: Laurel Gerdine, Franklin Energy and Bill Davis, Ameren Missouri*

How did Ameren Missouri integrate eight DSM Programs with ten implementers to create a best-in-class customer experience? They used a customer-centric approach, creating customer journeys for each program, addressing all touchpoints, across all channels. Hear how Ameren Missouri utilized a state-of-the-art customer engagement platform, bringing together educational content, eligibility, enrollment, scheduling, and purchasing functionality to convert a program-level (siloed) experience into a holistic cross-program experience.

**How Customer Research Improves Customer Engagement**  
*Speaker: Courtney Henderson, ILLUME Advising*

Customer experience is an important focus for the utility of the future. Leveraging persona development and customer journey mapping can improve the successful implementation of modern program designs. What are utilities doing to bridge the gap between a mapping workshop and implementation, and more importantly, is all this theory actually working once we get to implementation? Learn how the development of a well-thought-out customer journey map, and continuous reference to it, can guide the development and execution of a successful customer engagement program across both residential and small business sectors while profiling actual implementations for various utility programs.
Commercial Customers are Humans Too
Speakers: Thomas Brubaker, PECO and Matt Buecker, BGE
Commercial customers are not buildings, facilities, meters, accounts, equipment or technologies. They are people. And utilities are rethinking their commercial marketing strategies with that in mind. Leading the way to this new customer journey model are Exelon utilities who are parting from traditional account-based targeting and embracing business customers in a human-centric way – putting the decision makers at the center of strategy. Learn best practices around targeting the right commercial customers and identifying and engaging the people at those targets through properly timed marketing tactics that result in a longstanding and rewarding customer journey for all.

1:15 – 2:15PM Session 2D: Supplier Diversity (Panel) – Platinum 1-2
Moderator: Carla Walker-Miller, Walker-Miller Energy Services
Panelists: Emily Pearce, Evergreen Consulting; Ronnette Anderson, ICF; Lauren Casentini, Resource-Innovations; Joe Chow, SoCalGas; Tarrance Frierson, SCE; and Virginia Gomez, Southern California Minority Supplier Development Council (SCMSDC)
The first session is a panel solely focused on highlighting panelists’ experiences with supplier diversity and includes a large electric utility, a significant prime contractor in the energy industry, a diverse small business in energy efficiency, and a certifying agency. This panel promises to share what utilities REALLY want; how to partner with other companies to win contracts; and what it takes to become a certified supplier. You will engage with large suppliers looking for diverse companies, understand the unique nuances of utility proposals and how to respond; and gain clarity on how to navigate through the maze of certifying your company. You are encouraged to ask questions and get inside tips on how to succeed in this industry.

2:15 – 3PM Networking Refreshment Break in Expo Hall – Marquis Ballroom

3 – 4PM Session 3A: Industry Perspectives in iDSM (Panel) – Grand Ballroom Salon E
Moderator: Sharon Mullen, Guidehouse
Panelists: Charmaine Cigliano, Orange & Rockland; Jamie Barber, Georgia Public Service Commission; William Ellis, Pepco; Lon Huber, Duke Energy; and Tom Hines, Tierra Resource Consultants on behalf of APS
Ready or not, the integration of demand-side resources is transforming the industry. What does it mean to you? Old silos, budgets, less familiar resources and evaluation challenges can’t stand up to the logical integration of resources including EE, DR, EV, renewables, and storage. Brought to you by the AESP & PLMA partnership, this panel will present pathways forward for IDSM.
Tuesday, February 18, 2020 – continued

3 – 4PM  
**Session 3B: Learn from California’s Electrification Efforts (Panel) – Grand Ballroom Salon F**

Moderator: Chris Bradt, Frontier Energy

**Signs On The Road To Electrification**

Panelists: David Jacot, LADWP; Chad Asay, Sonoma Clean Power; Panama Bartholomy, Building Decarb Coalition; and Katie Sloan, SCE

Are you looking to accelerate local efforts to drive electrification? Are you interested in how technologies, data, policies, and programs can all be aligned to support this work? Our panel brings together multiple perspectives working with electrification efforts in California. Learn about current strategies to phase in electrification technologies, challenges and opportunities to scale their deployment, and considerations for access and equity in this fast-evolving approach to decarbonize California’s buildings.

3 – 4PM  
**Session 3D: Supplier Diversity Networking Session – Platinum 3**

Attend this session to meet directly with a number of utilities and energy consultants focused on diversity including: AEP, DTE, Southern California Edison (SCE), SoCalGas, Southern CA Minority Supplier Development Council, National Utilities Diversity Council, Honeywell, CLEAResult, DNV GL, Exelon, Franklin Energy, and ICF. Through this networking event, you will meet with senior level staff and leave the conference armed with new knowledge and vital contacts to develop future relationships and partnerships to promote your business and supplier diversity.

4 – 5PM  
**Topic Committee Meetings**

Open to ALL AESP Members! – Orange County Ballroom 1-3

Are you an AESP member looking for a way to get more involved? Attend this session to find a Topic Committee to participate in so you can contribute to our industry, and work alongside other members who share your area of interest or expertise.

Choose from seven Topic Committees:

- Business Issues and Models
- Implementation
- Marketing
- Research & Evaluation
- Gas Energy Efficiency
- Innovations in Tools and Technology
- Pricing and Demand Response

5 – 6:30PM  
**Networking Reception and Expo Prize Drawings in Expo Hall – Marquis Ballroom**

Eat, Drink, Win! Come for appetizers, drinks, and networking. Meet the exhibitors and play the Expo Game to win valuable gift cards and prizes. Stay for the prize drawing at 6:15pm because you must be present to win.

Expo Prizes
Sponsored by
Wednesday, February 19, 2020

6:30AM  Morning Yoga
          Limited spaces, pre-register at the AESP desk.

7AM – 4:30PM  Registration open

7:30 – 8:30AM  Networking Continental Breakfast
                in Expo Hall – Marquis Ballroom

8:30 – 9:45AM  Session 4A: Residential Technology (Rapid Fire) –
                Grand Ballroom Salon E

Moderator: Joannanne Bachmann, VEIC

Water Heaters as a Peak Pricing Tool
Speaker: Jessica Atwater, CLEAResult
Portland General Electric (PGE) manages a Connected Water Heater Program, with a fleet of more than 5,000 electric water heaters serving as a peak pricing demand response resource. The presenter will discuss why PGE initially focused on multifamily, the key successes and challenges faced creating this capacity resource, and how to plan to scale it to achieve significant curtailment. Come learn how to apply lessons learned around standard electric water heaters and see a demonstration of a demand response event.

Wrangling Energy and Demand Benefits Out of a Smart Home
Speaker: Essie Snell, E Source
Customers’ homes are rapidly getting “smarter” as adoption of connected home devices accelerates. Utilities can use this technology to help improve residential energy efficiency, add demand management flexibility, facilitate addition of renewables to the grid, and support new rate structures. Come hear the latest research on the potential of different smart devices and systems to yield energy and demand benefits. The speaker will also compare a few of the top emerging platforms and frameworks that can help utilities leverage these devices effectively and share insights on current customer perceptions and adoption of different smart technologies based on recent E Source market research.

Alexa, Add Voice to my Smart Home Pilot!
Speaker: Jeff Shaw, Southern Maryland Electric Cooperative
The Southern Maryland Electric Cooperative (SMECO) launched its Smart Home Pilot program in 2018. Participants received a home automation starter kit and received emails with customized recommendations generated from advanced analytics of AMI, participation, and smart home data. Join the session to obtain a summary on the project’s key findings, including insights and lessons learned around deployment of an Alexa skill as SMECO’s newest customer engagement channel.

30 for our 30th
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Wednesday, February 19, 2020 – continued

8:30 – 9:45AM  Session 4A – continued

**Opportunities and Challenges in Device-level Energy Monitoring**  
**Speaker:** Amalia Hicks, Cadmus

Come hear about a field test of customer-facing, residential load disaggregation technology in 200 Wisconsin homes. Multiple applications of device-level data will be presented, including energy and demand savings potential as well as behavioral changes resulting from interaction with the monitor and its associated messaging. Installation and connection challenges related to electric panel-mounted, broadband-connected devices will also be shared.

**Tell the EE Team that your T-Stat is doing DR!**  
**Speaker:** Jon Koliner, Apex Analytics

Integrated demand side management (iDSM) provided by a single vendor, even when delivered on behalf of separate utility business units, offers a glimpse into a future where myriad demand-side services can be delivered holistically. Energy Trust of Oregon implemented a pilot to deliver energy efficient thermostat setpoint optimization, in addition to demand response, throughout the winter and summer from December 2018 to September 2019. While data loss and deploying similar algorithms across multiple thermostat brands presented challenges, the optimization successfully delivered winter heating runtime reductions.

8:30 – 9:45AM  **Session 4B: Indoor Agriculture – Grand Ballroom Salon F**

**Moderator:** Gary Epstein, ERS

**The Hort Report**  
**Speakers:** John Wilson, City of Seattle and Gretchen Schimelpfenig, Burlington Electric Department

LED-based horticultural lighting is a new and rapidly evolving application, so is the relationship between utilities and this burgeoning market. Join us to get the scoop on product trends, utility program trends, and market dynamics. Learn about new tools and resources being developed to help utilities engage proactively with a customer class that is literally growing by the day.

**Harvesting the Benefits of Electrification in Agriculture**  
**Speaker:** Bethany Reinholtz, GDS Associates

Agriculture is often an overlooked sector in energy efficiency. While generally a small percentage of a utility’s customer base, agriculture’s energy use can actually be a significant cost, falling second only to labor. In addition, farms use significant amounts of liquid fuels, which offer an opportunity for energy efficiency and beneficial electrification. Changing climate patterns, increasing interest in urban agriculture and local food, and legalization of cannabis, has led to an increase in indoor growing, which uses higher amounts of energy than growing outdoors. Hear a discussion on current energy use across the agricultural sector, energy efficiency best practices, and technologies available to become more energy efficient through electrification.
Managing Your Cannabis Customers: Answering THE Lighting Question  
Speaker: Scott Shreenan, Efficiency Nova Scotia  
The cannabis industry is booming as Canada and an increasing number of U.S. states, have legalized cannabis for recreational use. As growing-operation loads on the grid increase, programs need to understand their unique world to better calculate savings. Hear about one of the most widely incentivized measures, lighting, which has not been well understood for effective comparison until now.

Rolling Your Own DSM: The Rapid Expansion Of Ontario’s Cannabis (And Other Indoor Agriculture) Sectors  
Speaker: Alex Tiessen, Posterity Group  
Electricity demand in Ontario’s covered agriculture sector is expected to expand quickly and significantly over the next five years. Vegetable greenhouses make up the majority of growth in the last five years, and continued growth in this subsector is likely to be aggressive. The recent legalization of cannabis is expected to compound the increasing demand on the electricity system. Join the presentation to hear about the newly developing cannabis subsector (both greenhouses and indoor facilities), which is expected to have a notable impact on the electricity grid, due to high intensity lighting and HVAC end-use requirements.

Turning Hard-to-Reach into Opportunity Audiences through Customer Segmentation  
Speaker: Daniel Cronin, U.S. EPA  
The EPA’s ENERGY STAR® developed a customer segmentation model that characterized customers according to their propensity to purchase energy saving products. This data was analyzed to create demographically cohesive consumer groups and then rank them based on energy-saving behaviors. Combining this data with media testing focused on specific products, opportunity audiences have been uncovered for expanding adoption of energy efficiency, particularly in the LMI segment, along with insights on effective media channels, imagery and messaging. Learn about these opportunity audiences and effective media strategies for deeper customer engagement.

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Wednesday, February 19, 2020 – continued

8:30 – 9:45AM  **Session 4C – continued**

**Engaging Homebuyers in EE with Real Estate Agents**
**Speaker:** Karl Hilker, CLEAResult

Learn how you can apply lessons learned from Wisconsin’s Focus on Energy Ambassador Initiative, a new program geared towards real estate professionals to increase awareness of energy efficiency upgrades with their clients. Not only does the offering show new homebuyers how to save energy and money, it also helps real estate agents provide resources to answer increasingly common questions about energy efficiency and set them apart from the crowd. Participants will obtain tips on how to develop relationships with these key market influencers in the homebuying process.

**EE For All – Market Development Initiative Engaging Underserved Communities**
**Speakers:** Kristol Simms, Ameren Illinois and Carla Walker-Miller, Walker-Miller Energy Services

Too often, those who would most benefit from lower energy bills are least able to afford energy-efficient upgrades. To make energy efficiency accessible to all, Ameren Illinois launched an innovative Market Development Initiative in 2018. Learn how this Initiative engages customers and brings energy efficiency to all by creating a customer journey increasing energy efficiency participation by people who have traditionally not participated, increasing diversity and inclusion in energy efficiency jobs, and expanding/launching new energy efficiency businesses.

**Evolving Trade Ally Engagement Through Opinion Leadership**
**Speaker:** Karen Germain, DNV GL

Participate in this discussion on the use of opinion leaders in the channel of trade allies to develop smarter, on-point marketing and outreach. Learn how to leverage Trade Ally Advisory Councils (TAAC) to improve channel dialogue, generate improved promotional offers, and identify market trends. Hear about one utility’s experience in deploying a TAAC and lessons learned.

8:30 – 9:45AM  **Session 4D: Fireside Chat – Elite 1**

**How I Climbed the Ladder**
**Speakers:** Michael Mernick, ICF and Sara Conzemius, ILLUME Advising

Want to learn how to get ahead? Join this Fireside Chat, featuring Mike Mernick, Senior VP of ICF, and Sara Conzemius, founder and co-owner of ILLUME Advising, to hear how they successfully climbed the ladder in their careers to become two of the most well-respected leaders in our industry. Hear tips, tricks, and missteps to avoid as you navigate your career path.
(What is a “Fireside Chat”? Coined during the 1930s after casual presentations conducted by FDR, it is an informal yet structured interview and a new session style that AESP is introducing this year. Audience members will be given the opportunity to ask questions about how to succeed. Think “Inside the Actors Studio” but with a leadership focus!)

9:45 – 10:30AM
Networking Refreshment Break
in Expo Hall – Marquis Ballroom

10:30 – 11:45AM
Session 5A: Commercial Tech (Rapid Fire) – Grand Ballroom Salon E

Moderator: Kurt Hauser, Missouri River Energy Services

Breaking Boundaries: Advanced Lighting Controls for Small Business Customers
Speaker: Amy Glapinski, Consumers Energy
The intelligent lighting market continues to innovate, presenting programs with an unprecedented opportunity to reach new customers. In 2015, Consumers Energy capitalized on this opportunity by launching one of the nation’s first dedicated Advanced Lighting Controls (ALC) programs. While the program was successful in attracting large customers, small customers were not benefiting. To address the market gap, and promote the next wave of ALC technology, Consumers Energy launched the Small Business Advanced Lighting Program in 2018. Hear the details around those efforts and obtain concrete examples on how ALC systems can benefit a utility’s small customers.

Commercial Lighting Is Not Going Away, It’s Changing
Speaker: William Walker, Energy Solutions
Commercial lighting remains the low hanging fruit of demand side management programs. However, saturating markets, regulatory changes, and savings evaluations are tightening the technology’s ability to deliver cost-effective energy savings. Many administrators are preparing for “life after lighting”, as though given a terminal diagnosis, while the supply side is just heating up. Glean insights directly from the lighting industry, including technology trends, status on advanced lighting control market readiness and adoption, and program design strategies to carry lighting into our future portfolios.

Window Attachments: Dynamic Opportunities for Energy Savings
Speaker: Erika Burns, D+R International
Learn about the AERC Window Attachment program and the newest and most cutting edge AERC programs and window attachment technologies. As automation and smart home technology become ubiquitous in the efficiency space, attendees will leave the session armed with information about how window attachments are entering the automation sphere. Participants will gain a clear understanding of the benefits window attachments offer, specifically from secondary glazing and automation systems, the knowledge they need to interface with customers and colleagues to investigate and implement these new measures will also be discussed.
A Field Study of Q-Sync Motors in Commercial Spaces
Speaker: Joe Zhou, Slipstream
Q-Sync motor is a new type of permanent magnet synchronous motor. The manufacturer claims they used 20-45% less power vs. electronically commutated (EC) motors, and up to 80% less power vs. shaded-pole and permanent split capacitor motors that are commonly used in existing walk-in cooler and freezer evaporator fans. It also boosts motor power factor from ~0.6 to ~0.93. The cost is comparable to that of an EC motor. Learn about the findings from a field study at three small businesses in Illinois, retrofitting existing evaporator fans with Q-Sync motors and blades which will include simple payback and lessons learned.

Opportunities for Condensing Gas Rooftop Units
Speaker: Jeffrey Rigotti, NEEA
Why are we still putting 80% efficient furnaces on commercial rooftops when we commonly get 95%+ efficient furnaces in our homes? Come to this session to discuss the barriers preventing market adoption of Condensing Rooftop Units (C-RTUs), based on findings from market research and a field trial completed at four sites in the Northwest. Turns out a little bit of piping can be a big barrier. But there is hope and audience-generated solutions are encouraged!

10:30 – 11:45AM Session 5B: Gas Energy Efficiency – Grand Ballroom Salon F
Moderator: Sharareh Moaddeli, SoCalGas
Advancing Gas DSM in an Era of Electrification
Speaker: Colin Norman, FortisBC
What if customer advocates, community stakeholders, and governments all advocated for the natural gas utility in a DSM filing? Find out how FortisBC accomplished exactly that in their recent DSM Expenditure Plan filing, resulting in approval for a nearly three-fold increase in gas DSM spending. Led by a new and innovative collaborative approach, the presentation will review how FortisBC engaged with policy makers, the Utilities Commission, and then key stakeholders through over 100 collaboration touchpoints to achieve unprecedented results.

Evolving Whole Home Programs – Driving Continual Savings
Speaker: Jenna Bentley, Enbridge Gas
Enbridge Gas’s Home Efficiency Rebate Program takes a comprehensive whole-building approach to encourage multi-measure uptake and drive deep energy savings. Over the last two years, the program has successfully completed 50,000+ home retrofits. Hear about the successes and challenges of running a whole home program, including how to adapt to increasing baselines.
10:30 – 11:45AM  Session 5B – continued

Residential Performance Based Energy Savings – Rebating Homeowners
Speaker: Patrick McMahon, Summerhill
Explore results from the first performance-based residential retrofit home rebate program, Home Energy Plan, in Canada that pays customers rebates based on their actual energy savings. Offered by Energy Efficiency Alberta, this innovative performance-based model is data driven, provides a heightened customer experience and deeper savings. Using mobile optimized and real time data, this contractor led program works with EnerGuide evaluators and gives participants the tools they need to plan for retrofits that optimize energy savings.

Using Smart T-Stats to Engage Customers and Drive Retrofit Projects
Speaker: Joe Nunley, PSD
Join the discussion to see how Smart Thermostats can be used to drive participation and increase conversion rates in residential gas retrofit programs and hear a case study from a major Pennsylvania gas utility’s experience.

10:30 – 11:45AM  Session 5C: Midstream – OC Ballroom Salons 1-2

Moderator: Art Christianson, The Home Depot
Recipes for Foodservice Market Transformation
Speakers: Celina Stratton, Energy Solutions and Melisa Marks, SoCalGas
Commercial foodservice establishments are some of the most energy intensive buildings on the grid, often consuming five to seven times as much energy per square foot as average commercial buildings. Foodservice operators are often time- and cash-constrained, making them exceptionally difficult to reach through most energy efficiency programs. With a streamlined design and strong relationships with suppliers, the “point-of-sale” or “midstream” foodservice program design has led to significant energy savings by driving sales of high-efficiency foodservice equipment. Join us to understand our lessons learned for engaging foodservice equipment dealers and customers from the successful SoCalGas point-of-sale program, as well as others across the country.

Raising the Roof-Top Unit Efficiency
Speakers: Katie Vrabel, Waypoint Energy and Shonte Davidson, Eversource
Rooftop units are the unsung heroes of any small office, restaurant, or retail environment. Unfortunately, many operate poorly resulting in increased energy usage and decreased levels of comfort for building occupants. The Advanced Rooftop Unit (ARTU) Campaign is a national initiative by the U.S. Department of Energy’s Better Buildings Alliance to promote efficiency gains through the replacement and retrofit of existing rooftop units while driving market transformation. As an ARTU Campaign partner, this session will explore Mass Save’s program design to successfully drive installations and retrofits resulting in significant savings.
Evaluating the ENERGY STAR Retail Products Platform
Speakers: Peter Banwell, U.S. EPA and Jeff Harris, NEEA

The ENERGY STAR Retail Products Platform (ESRPP) is a nationally coordinated, midstream effort designed to transform markets by streamlining and harmonizing energy efficiency programs with retailers. Due to its market transforming potential, the right evaluation techniques are crucial to capturing impacts and attribution. Participants have been working together to develop a tailored approach for evaluating ESRPP. Join this discussion to learn the initial evaluation results, the key refinements needed to fully capture the benefits of ESRPP, and the barriers to continued program growth.

Networking Lunch in Expo Hall – Marquis Ballroom

Chapter Lunch Meetings
California – Platinum 2
MidAtlantic – Platinum 3
Southeast – Platinum 4
Next Chapter (Great Lakes) – Platinum 1

Session 6A: Aligning Around Carbon to Accelerate the Energy Transition – Grand Ballroom Salon E

Moderator: Quinn Parker, EMI Consulting

Next-Gen EE Targets
Speaker: Weston Berg, ACEEE

Energy efficiency resource standards (EERS) have been a key tool for delivering energy savings in states across the country. Now states are looking to their energy efficiency policies to do more, such as meet aggressive climate goals, lower costs, improve grid flexibility, and provide bill savings and healthier homes to those with the highest need. This presentation details progress in five states as they shift toward next-generation EERS policies and highlights best practices for using EERS to deliver climate, cost, grid, and equity benefits.

In the Name of Carbon: Simplifying Energy Reductions in Buildings
Speaker: Luke Surowiec, ICF

The NYC Retrofit Accelerator grew out of a need to drastically reduce carbon emissions from the building sector to meet the city’s targets, but it also offered a glimpse into the benefits of a technology- and fuel-neutral, carbon-based program. This city-funded, energy advising service met customers with the help they needed without the boundaries of traditional incentive programs. From 2015-2019 the program assisted close to 3,000 buildings with projects ranging from simple lighting conversions to comprehensive deep retrofits, and everything in between. We’ll explore the program’s success and the benefits of using carbon as the central driver for programs.
NOT a Carbon Copy: Updating TRMs to Capture Carbon Savings
Speaker: Brian Uchtmann, Michaels Energy
Current Technical Reference Manuals (TRMs) provide energy efficiency stakeholders – implementers, utilities, and policy makers – with the tools to effectively plan and deliver energy efficiency programs. This session highlights a selection of common TRM measures and compares the energy savings with carbon savings associated with each measure. The carbon reductions will consider regional electric grid emission factors. For many measure types, energy and carbon savings are not directly correlated. Our analysis identifies what parameters need to be characterized and included to develop methods to accurately quantify carbon savings.

Moving Towards Energy Sufficiency
Speakers: Gil Peach, H.Gil Peach & Associates and John Mitchell, Mitchell Analytics
The charter for energy efficiency work in designing EE programs and Integrated Resource Plan (IRP) portfolios is providing the same or enhanced energy services with less energy use. The California Standard Practice Manual (CSPM) emphasizes this approach. Today the National Standard Practice Manual (NSPM) enables jurisdictions to introduce additional “terms and conditions” for program and IRP planning, depending on the policy perspectives of the jurisdiction. The speakers provide the Energy Sufficiency approach as an adder to EE to also emphasize resource efficiency and help clients adapt to accelerating climate change. Carbon savings is a necessary additional criterion in EE work and so is adaptation (resiliency). As Greta Thunberg says, “the house is on fire.” We must act accordingly.

Session 6B: Heat Pumps – Grand Ballroom Salon F
Moderator: Steve Bohlman, Slipstream
It’s Below 10°F Outside: Get an Air Source Heat Pump!
Speaker: Ben Schoenbauer, Center for Energy and Environment
Air-source heat pumps (ASHP) have become one of the most popular technologies in efficiency and electrification circles, yet stakeholders are still uncertain about their cold-climate performance and program potential. Recent technology improvements mean that ASHPs can transfer heat into homes from exterior temperatures below 0°F, but contractors and utilities remain unsure about the technology. Discuss energy savings and efficiency findings from a study of eight ASHPs installed in Minnesota homes as well as the role ASHPs could play in utility programs as well as barriers that currently prevent widespread market penetration. Hear about suggested program solutions to address these barriers.
Can Heat Pumps Replace Gas Heat?
Speaker: Samuel Ross, Optimal Energy
This analysis investigates the cost-effectiveness of an illustrative natural gas heating system replace-on-burnout project with two choices: install a new gas boiler or convert to electric heating via air source heat pump (ASHP). Grounded in real-world data from the Rhode Island marketplace to inform system costs and emissions of each option, come hear an analysis calculating the cost-effectiveness of the ASHP compared to the baseline of a new gas boiler, and a comparison of when the value of decarbonized electric generation is and is not counted, as well as when the degree of decarbonization is uncertain.

Gas Heat Pump Roadmap
Speaker: Alexis Allan, Brio
Fifteen gas utilities joined forces to conduct a gas heat pump (GHP) market and technology assessment identifying opportunities, information gaps, impediments and strategies to accelerate the commercialization and market acceptance of GHPs in North America with COPs greater than 1.0. Come hear how this project engaged utilities, manufacturers, technology developers, and energy organizations to identify technologies and strategies aimed at making gas heat pumps a reality across sectors and end uses. The Gas Heat Pump Roadmap was completed in 2019. We will also discuss the group’s next steps to expand collaboration and plans to accelerate acceptance of gas heat pumps.

Machine Learning Methods Improve Evaluation of Metered Energy Consumption
Speaker: Andrew Royal, Res-Intel
The prevalence of advanced metering infrastructure has led to an increased availability of high-frequency interval consumption data, and machine learning methods offer improved energy predictions in the presence of Big Data. Demand side management programs can benefit from machine learning models because improved predictions increase the reliability of measured program savings. Review recent developments in the application of machine learning techniques to model energy consumption in the evaluation of demand side management programs.

It’s Easy, AM-I Right? Verifying Natural Gas Impacts
Speaker: Kyle McKenna, EcoMetric Consulting
Modeling gas usage can have some hurdles, but it presents a consistent and scalable method for validating normalized savings at the meter while avoiding expensive and intrusive data collection methods such as on-site inspections and metering. Listen to real world findings and lessons learned from developing and deploying M&V 2.0 procedures for a gas efficiency program.
1:15 – 2:15PM  
**Session 6C – continued**

**Moving The Needle Forward With Advanced M&V**  
**Speaker:** Iris Tsui, Opinion Dynamics  
Modeling Advanced Metering Infrastructure (AMI) data provides many advantages compared to traditional energy savings evaluations. This session compares and contrasts how a voltage optimization program and a commercial demand response program are both leveraging AMI data, and implications for delivering timely reporting results that add value to utilities.

2:15 – 3PM  
**Networking Refreshment Break**  
in Expo Hall – Marquis Ballroom

3 – 4PM  
**Session 7A: Electric Vehicle Adoption – Grand Ballroom Salon E**

**Moderator:** Richard Schorske, ZNE Alliance

**Nudging Car Shoppers Towards EV Purchases with Choice Engines**  
**Speaker:** Anne Arquit-Niederberger, Enervee  
Utilities have a critical role to play in creating a level playing field for electric vehicles (EVs) – and roughly two-thirds of customers want their utility to help them understand EV benefits, while less than 20% think their utility is doing enough. Utilities that respond to this call to action by providing vehicle choice engines strengthen their trusted advisor role and speed EV deployment. Hear initial results of utility-branded Cars Choice Engines, operating in states including New York, Ohio and California.

**Implementation of a Statewide EV Program**  
**Speaker:** Sarah Chatterjee, NV Energy  
Join this session to learn about Nevada’s Electric Vehicle (EV) Charging Incentives program, including utility implementation, early program results, and second-year market changes. The presentation summarizes the program, which incentivizes Level 2 and DC Fast Chargers for multi-family, fleet and workplace EV charging. Key takeaways will include program design and incentive considerations, customer engagement tactics and strategies to inform key market participants.

**Bridging the Gap to an Electric Transportation Future**  
**Speakers:** John Morris, D+R International and Emily Phan-Gruber, Duquesne Power and Light  
This session is a unique opportunity for energy professionals to learn how to plan for an electric vehicle future from a utility perspective. Through a discussion of strategic marketing principles within the context of educating consumers on EVs, come away with a deeper understanding of different strategies utilities have at their disposal for engaging with customers through EVs. Learn more about how to ensure that you are doing so in an inclusive and equitable way.
Planning for the Future of EE in Illinois with New Technology
Speakers: Mark Milby, ComEd and Kelly Mulder, ILLUME Advising

New legislation and maturing markets have changed energy efficiency portfolio planning in Illinois. To respond to these changes, the ComEd Emerging Technologies Team developed pathways to test, validate, and integrate new technologies and approaches into their program portfolio. From strategy development through tech transfer, the speakers will highlight key considerations at each stage and engage participants to apply to their own program strategies. Attendees who are grappling with declining program savings, increasing savings targets, or the need to engage customers with new technologies and approaches will be most interested though the content is applicable to anyone engaged in EE portfolio planning.

Boosting Participation and Customer Satisfaction: Support for Mature Programs in Nevada
Speakers: Mark Darden, DNV GL and Adam Grant, NV Energy

How do you grow customer participation and consistently exceed goals in mature energy efficiency programs? Learn how to enhance your program to better meet customer needs, push forward creative program offerings, and develop a strategic outreach plan. The concepts that will be presented will secure program longevity, improve customer satisfaction and position a program to exceed energy efficiency goals.

The Next Frontier of Energy Code Support in Massachusetts
Speakers: Kevin Rose, National Grid and Kathy Greely, PSD

Rising baselines present significant challenges to the implementation of mature energy efficiency programs, especially New Construction (NC) programs. As modern energy codes begin to threaten the cost-effectiveness of NC programs, supporting the advancement of these codes is a largely untapped opportunity for low-cost, long-term, and predictable energy savings. The speakers will describe the latest efforts in Massachusetts to produce, demonstrate, and measure energy savings from both code compliance enhancement and code and standards adoption efforts. Program planners, implementers, and evaluators will gain insight into the compelling case for energy code support as part of a mature utility portfolio and key considerations for success.

30 for our 30th
Be on the lookout for gift card awards throughout the conference, with value from $50 to $500!
3 – 4PM  
**Session 7D: Professional Development: Unconscious Bias – Elite 2-3**

**Unconscious Bias: Don’t Ignore it, Excuse it, or Become Immobilized by it**  
Facilitator: Jamie Hutchins, Step Up Equity Matters  
Humans often make decisions based on unconscious stereotypes that bias our actions. This interactive session focuses on strategies for individuals, managers, and organizations to recognize and overcome unconscious bias. Get ready to laugh, think hard about yourself, and leave with concrete actions for change.

4 – 4:15PM  
**Break - Stretch Your Legs**

4:15 – 5:15PM  
**Session 8A: California Residential Electrification (Panel) – Grand Ballroom Salon E**

Moderator: Kevin Wood, Southern California Edison  

**At Home in 2045: Advancing building electrification programs to meet California’s environmental goals**  
Panelists: Maya Gantley, California Association of Building Energy Consultants; Charles Li, Energy and Environmental Economics (E3); Rory Cox, CPUC; and Scott Blunk, SMUD  
Regulators in California have recently noted that strategic electrification represents “the most viable and predictable path” to achieve a zero-emission future. Electrifying buildings through space conditioning, water heating systems, cooking, and even clothes drying has emerged as a critical piece of California’s climate strategy to meet its goals for GHG reduction, energy efficiency, and air quality. Strategic or beneficial electrification can provide a decarbonization pathway for transforming the residential market segment through the displacement of combustion-based heating equipment with cleaner, more efficient all-electric alternatives. Learn about some of the innovative policy and building electrification programs that are stimulating the market and helping California address its climate goals today.

4:15 – 5:15PM  
**Session 8B: Regional Round-Up (Panel) – Grand Ballroom Salon F**

Moderator: John Hargrove, AESP  

Panelists: Stacey Paradis, MEEA; Susan Stratton, NEEA; Mandy Mahoney, SEEA; and Gene Rodrigues, CEDMC  
Regional organizations play an important role in their respective region in a variety of ways, from educating various stakeholders on energy efficiency to helping shape energy-related policy. While each organization may operate somewhat differently and have different missions, all have a unique perspective on best practices, barriers, and the future of energy efficiency in their region. Listen to leaders from four of these regional organizations as they share their perspectives on opportunities and threats that will shape energy efficiency over the next several years.
Session 8C: Oh Canada! (Panel) – OC Ballroom Salons 1-2

Moderator: Raegan Bond, Dunskey Energy
Panelists: Lee Wood, Energy Efficiency Alberta; Danielle Wensink, FortisBC; and Colleen Kuruluk, Efficiency Manitoba

The Puck Stops Here – Perspectives from Leading Canadian DSM Executives

This executive session will engage the DSM leaders of Energy Efficiency Alberta, Efficiency Manitoba and FortisBC in a conversation about the challenges and opportunities of leading DSM organizations. Topics will be wide-reaching and will touch upon policy (e.g. expanding/shifting portfolio mandates, carbon policy), operations (e.g. managing both gas and electric DSM, portfolio optimization) and leadership (e.g. change management, workplace diversity). In addition to provincial DSM trends, the panelists will share their insights and predictions related to technologies, policies and other disruptive forces that will impact the entire North American DSM industry over the coming years.

Special Event: NO PROHIBITION, NO INHIBITION!
Back to the 1930s Speakeasy Party – Platinum Ballroom

For one night, be transported back to the 1930s. What happened in the 1930s? Well, the 21st Amendment ended the prohibition of alcohol and gangster Al Capone was convicted. Come enjoy good food and drinks alongside live music from a jazz band. Then try your luck at casino games – chips will be provided so there’s no fear of losing real money! Come make new friends or join old friends and take pictures to remember this occasion at the ‘30s Speakeasy Photo Booth. Be amazed by the unique ‘living’ decor - ideal photo op!
Thursday, February 20, 2020

8AM – 12PM  Registration Open

8 – 9AM  Networking Continental Breakfast – Platinum Ballroom 5-6

9 – 10:15AM  **Session 9A: Electrification – Grand Ballroom Salon E**

*Moderator: Holly Baird, Milepost Consulting*

**The Electrification Slide: How to Successfully Sell Electrification**

*Speaker: Jason Snyder, Tennessee Valley Authority*

One of the first steps in any successful program is staff education. However, when business imperatives change and lead times are short, teams may not pause to evaluate their training approach. When Tennessee Valley Authority’s EnergyRight® Business & Industry team needed to implement a Strategic Electrification program in a short amount of time, they had to do things differently to be successful. By pairing the right learning styles with internal and external audiences, they quickly launched a successful program. Through collaborative learning, technical experts, strategic partnerships, and a sector-based go-to-market strategy, Tennessee Valley Authority crafted an electrification program that continues to meet goals and works for stakeholders. Hear best practices and key strategies for developing and implementing a commercial electrification program.

**Electrifying a 100-year-old New York City Brownstone**

*Speaker: Jon Hacker, Daikin North America*

Learn about the challenges and opportunities presented when electrifying medium-sized multifamily buildings. Learn the entire process, key considerations, and the expected environmental impacts, energy cost savings, and comfort-related improvements. By understanding about how to electrify a key portion of the Northeast’s building stock, you’ll be able to replicate these results while avoiding pitfalls and supporting your organization’s demand-side management program and electrification goals.

**Strategic Electrification: Leveraging What We Built While Planning the Future’s Grid**

*Speaker: Ellen Steiner, Opinion Dynamics*

Learn key considerations for decarbonization and strategic electrification through the design of California’s new strategic electrification programs. You will review the California study, which will touch on a myriad of topics, ranging from workforce training needs, to available technologies, to leveraging and accurately accounting for DERs in the grid of the future. The findings from the study are applicable in all states as they decarbonize their grids and pave the way for strategic electrification.
Putting the “You” in Time-of-Use
Speaker: Sarah Colvin, ecobee

We’re really in a time-of-change, aren’t we? Traditional silos of EE and DR are giving way to a more integrated approach to DSM. Rate structures are evolving to reward and penalize customers for behaviors we’ve been encouraging them to adopt for years. Jurisdictions across North America, who have rolled out time-of-use rates to customers, know how crucial it is to back that up with education, awareness and enabling technologies. Learn about how Smart Thermostats can deliver intelligent, personalized load shifting to benefit the customer and the grid in homes across the U.S. and Canada.

If You Build it They Will Come - Using Modern Rate Design to Drive Customer Engagement
Speakers: Brian Pippin, JEA and Ahmad Faruqui, Brattle Group

Dive into the growth and expanding development of time-of-use (TOU) and demand based rates across the utility industry. Join this discussion that focuses on the evolving TOU rate structures growing in the industry and how utilities can use rate transformation to its advantage to grow customer engagement and increase customer satisfaction.

Making the Smart T-Stats a Hero in Managing TOU Rates
Speaker: Don McPhail, Uplight

More utilities are turning to time-of-use (TOU) rates, but these rates bewilder customers and can leave them with higher bills than ever before. Forward thinking utilities will use this opportunity to educate and engage with customers, and give them the tools they need, such as smart thermostats, to manage these rates without being held captive to their clocks. Walk through the customer journey, from start to finish, on what customers need to be successful in managing rates with a BYOD program and lessons learned from a summer program in 2019.

Keeping up with the Jetsons: Is the Connected Home Living Up to the Hype?
With the arrival of smart thermostats, robotic vacuums and camera-activated doorbells, it seems as if the age of the Jetsons has finally arrived. Come join our discussion as we debate the reality of connected homes. Are they living up to the promise of smart homes that
anticipate our every need or is the connected home creating a digital divide? This fast-paced panel debate both the promises and disappointments associated with the connected homes. Astro just can’t wait to greet you!

9 – 10:15AM  **Session 9D: Fireside Chat – Elite 1**

*Mentoring Moments – The Value is in these Critical Moments*

**Speakers:** Quinn Parker, EMI Consulting and Melissa Culbertson, ADM Consulting

Mentors, sponsors and colleagues all make up your professional network and support you as you navigate through your career. No matter if your career path is clear or if you are unsure about what you want to do (or be), this network is an incredible source of varied opinions and perspectives. Everyone in your network can be a mentor, if not for years, just for a moment. “Mentoring Moments” are those pivotal conversations that often result in career-changing and sometimes life-altering decisions. Gathering information from the right trusted professional in your network, at the right time, is a valuable skill no matter where you are at in your career. Join this session to take part in a candid conversation on the importance of building a professional network, hear tips on how to leverage these relationships and potentially win a book on how to build your network!

10:15 – 10:45AM  **Networking Refreshment Break – Ballroom Foyer**

10:45AM – Noon  **Session 10A: Charging the EV Revolution – Grand Ballroom Salon E**

**Moderator:** Udi Merhav, energyOrbit

*Charge the North: EV Charging Profiles and Preparing for Mass Adoption*

**Speaker:** Mark Goody, FleetCarma

Charge the North is a research initiative managed by FleetCarma, in partnership with the Government of Canada and nine electric utility companies across the country, to accelerate and enhance the nation’s electric vehicle charging infrastructure. Listen to an overview of Charge the North, including scope, design, implementation and key findings from the program including participant characteristics, charging profiles and load analysis for short-range and long-range plug-in vehicles and average loads at various utility system levels.

*Modeling Grid Impacts of EV Charging*

**Speaker:** Walter Schaefer, ERS

Come to this session to learn about the speaker’s research on the grid impacts of electric vehicle charging and how it can help utilities and facility managers understand the effect that dynamic charging will have on their operations and bottom lines. This work combines granular prototypical charging data with ERS’s high-resolution load modeling platform to model EV charging’s impact on facility and utility load shapes and assess the effectiveness.
of using time-of-use utility rates and strategically-placed DERs to mitigate the potential negative impacts of EV charging. As transportation electrification continues to proliferate, this work will be crucial in managing EVs effectively.

**I Wanna Soak Up the Sun: Absorbing Excess Solar Supply with Workplace Charging**  
**Speaker: Emma Rieves, E Source**

States such as California with high degrees of solar penetration are increasingly forced to contend with the “duck curve” and a growing imbalance between periods of peak solar generation and peak grid demand. Electric vehicles offer many potential benefits in absorbing excess solar supply, but most utility time-of-use rates encourage charging in nighttime off-peak hours. An alternative method to encourage off-peak EV charging—while simultaneously soaking up excess solar generation—Involves incentivizing more workplace charging. Explore how TOU rates and smart charging technologies can help develop workplace charging while delivering benefits to the grid and commercial customers.

**Establish Energy Equity for Low Income Customers**  
**Speaker: Lisa Markus, E Source**

Low-income programs are not enough. Decarbonization demands that utilities reframe their objectives and actions in terms of establishing energy equity. Without careful attention, low-income customers will likely be stuck shoulderng increasing costs of the traditional grid, making “heat or eat” decisions, which erode health and render them unable to participate in energy efficiency/demand response that hold the highest potential of impacting GHG emissions. Join the session for an innovative thinking and road mapping session designed to deliver on utility business objectives by partnering with their most vulnerable customers.

**For Good Measure: Quantifying Non-Energy Benefits in Underserved Populations**  
**Speakers: Beth Parsons, Tennessee Valley Authority and Bruce Tonn, Three3**

In the Tennessee Valley, 40% of households qualify for low-income based weatherization programs. In order to reach more energy-burdened residents, Tennessee Valley Authority’s EnergyRight® Solutions is working to grow the impact of their well-established Home Uplift weatherization program. By collecting data around non-energy benefits, TVA sees an opportunity to monetize health benefits and develop a business case for wellness that will access new funding sources, expand their program and improve the vitality of its customers. Hear the research findings, the strategy for creating a replicable, scalable program, and brainstorm further needs and opportunities with the audience.
Understanding Low-Income Energy Consumers in Texas
Speaker: Michael Stockard, Stockard Energy Advising
The Texas Low-Income Communities Profile Series aims to offer insights into the lived experiences of low-income Texans, for whom the cost of energy creates a disproportionate financial burden. Utilities, service providers, and policy makers strive to serve their customers and constituencies to the highest level of performance. However, underserved communities struggle to meet financial obligations associated with the energy consumption necessary to maintain a healthy and productive lifestyle. With a thoughtful and holistic investigation into the lives of people experiencing energy poverty, we strive to better prepare stakeholders to advance lasting energy solutions most suitable for low-income communities.

Building EE into Affordable Housing
Speaker: Corrie Morton, Enbridge Gas
Learn how Enbridge implements its Savings by Design Affordable Housing Program, which is a low-income, green building initiative created to help participants design and construct affordable housing to be more energy efficient than required by the Ontario Building Code. The program features an Integrated Design Process (IDP) Workshop, where green building experts examine the participant’s planned housing development and suggest design options to improve energy efficiency. Design options are live energy-modelled to show potential energy and cost savings, and financial incentives are available at the construction stage for achieving enhanced energy performance in the final building design.

Session 10C: Cost-Effectiveness Workshop – OC Ballroom Salons 1-2
Everything You Wanted To Know About Cost Effectiveness
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 workshop, targeting implementers, marketers and business developers, or evaluators who want to get back to basics, explains the different tests, the inputs, and how to run the tests. Understand how different inputs affect cost effectiveness. Be prepared to do some math and have a few “aha” moments.

Session 10D: Live InFocus – Platinum 1-4
Want to know more about the varied products and services available to you and your company? Stop into this unique LIVE! InFocus sessions that will feature vendors sharing their solutions, ideas, tips and techniques. Positioned as a ‘speed dating’ session, you will have a rare opportunity to gather the latest information and insights on innovative companies delivering the solutions you need now. In 10-minute increments, you can listen to
fast-paced presentations from the companies that interest you the most. So make it a point to attend this session, hear what industry and consultants are doing, about the markets they serve and their successes.

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<th>Presentation Time</th>
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Noon – 1:30PM  Lunch and Closing Plenary – Platinum 5-6  

**The Top 30 Gamechangers in Energy Efficiency in the last 30 Years**
Presenter: Bill LeBlanc, Chief Instigation Agent, E Source, Part 1 Emcee
Find out what and who made the list of industry Gamechangers which have significantly shaped our industry in the last 30 years.

**Crowd Sourced Discussion: “The Next 30 Years”**
Scott Boose, CEO, CLEAResult, Part 2 Facilitator
Nick Brod, Senior Vice President, DNV GL
Patty Cook, ICF, Senior Vice President, ICF
Utility – invited
Carmen Best, formerly CPUC

Where are we headed? Where will the next 30 years take us? You ask the questions, and our panel of esteemed industry leaders weigh in with their opinions.

**Stay till the end for big prize drawings, including a Grand Prize.**