

## RTR Appendix

Southern California Edison, Pacific Gas and Electric, Southern California Gas, and San Diego Gas and Electric (“Joint Utilities” or “Joint IOUs”) developed Responses to Recommendations (RTR) contained in the evaluation studies of the 2013-2015 Energy Efficiency Program Cycle. This Appendix contains the Responses to Recommendations in the report:

***RTR for the Integrated Demand Side Management: A Study of Preferences and Patterns of IDSM Uptake in California’s Residential and Small Commercial Markets***  
(Evergreen Economics, Calmac ID #CPU0120.01)

The RTR reports demonstrate the Joint Utilities’ plans and activities to incorporate EM&V evaluation recommendations into programs to improve performance and operations, where applicable. The Joint IOUs’ approach is consistent with the 2013-2016 Energy Division-Investor Owned Utility Energy Efficiency Evaluation, Measurement and Verification (EM&V) Plan<sup>1</sup> and CPUC Decision (D.) 07-09-043<sup>2</sup>.

Individual RTR reports consist of a spreadsheet for each evaluation study. Recommendations were copied verbatim from each evaluation’s “Recommendations” section.<sup>3</sup> In cases where reports do not contain a section for recommendations, the Joint IOUs attempted to identify recommendations contained within the evaluation. Responses to the recommendations were made on a statewide basis when possible, and when that was not appropriate (e.g., due to utility-specific recommendations), the Joint IOUs responded individually and clearly indicated the authorship of the response.

The Joint IOUs are proud of this opportunity to publicly demonstrate how programs are taking advantage of evaluation recommendations, while providing transparency to stakeholders on the “positive feedback loop” between program design, implementation, and evaluation. This feedback loop can also provide guidance to the evaluation community on the types and structure of recommendations that are most relevant and helpful to program managers. The Joint IOUs believe this feedback will help improve both programs and future evaluation reports.

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Page 336, “Within 60 days of public release of a final report, the program administrators will respond in writing to the final report findings and recommendations indicating what action, if any, will be taken as a result of study findings. The IOU responses will be posted on the public document website.” The Plan is available at <http://www.energydataweb.com/cpuc>.

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Attachment 7, page 4, “Within 60 days of public release, program administrators will respond in writing to the final report findings and recommendations indicating what action, if any, will be taken as a result of study findings as they relate to potential changes to the programs. Energy Division can choose to extend the 60 day limit if the administrator presents a compelling case that more time is needed and the delay will not cause any problems in the implementation schedule, and may shorten the time on a case-by-case basis if necessary to avoid delays in the schedule.”

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Recommendations may have also been made to the CPUC, the CEC, and evaluators. Responses to these recommendations will be made by Energy Division at a later time and posted separately.

**Response to Recommendations (RTR) in Impact, Process, and Market Assessment Studies**

**Study Title:** Integrated Demand Side Management: A Study of Preferences and Patterns of IDSM Uptake in California’s Residential and Small Commercial Markets  
**Program:** IDSM Uptake  
**Author:** Evergreen Economics  
**Calmac ID:** CPU0120.01  
**Link to Report:** [http://calmac.org/publications/IDSM\\_CustomerResearchStudy\\_CPU0120.pdf](http://calmac.org/publications/IDSM_CustomerResearchStudy_CPU0120.pdf)

Item #	Page #	Findings	Best Practice / Recommendations	Recommendation Recipient	Disposition (Accepted, Rejected, or Other)	Disposition Notes (e.g. Description of specific program change or Reason for rejection or Under further review)
1	11	None listed in section 1.3.	The IOUs and CPUC should work together toward enhancing the supply chain for IDSM, including increased direct sales marketing efforts. We recommend the IOUs provide tailored one-on-one support for IDSM where requested by customers, and also initiate targeted direct marketing efforts via third parties, contractors and IOU customer representatives.	IOUs and CPUC	Accepted	The IOUs are continuously evaluating and implementing better ways to communicate with customers. Each of the IOUs has Account Executives (AE) assigned to particular accounts to service them directly. All other customers beyond those supported by the AEs have access to information via online tools, call center support, specialists, and outreach personnel at a wide variety of events throughout the community. Customers that request support for IDSM are usually provided support either by the call center representatives or through audits. Third parties and contractors are also trained on IDSM.
2	11	None listed in section 1.3.	Furthermore, we suggest one-on-one IDSM direct marketing efforts would best be targeted to single-family customers with longer tenure in their homes and with higher than average energy bills. Targeting unusually high bills with personal contact follow up may also prove effective.	IOUs and CPUC	Other	The IOUs use dynamic information systems to determine who these customers are and market programs to them that best fit their individual needs. Further, the IOUs outreach teams frequently attend community events to explain all the options available to all customers and give them an opportunity to ask questions. The IOUs also offer a variety of ways to connect online and via call centers. The IOUs have identified the importance of online engagements and have place more emphasis in that direction to help facilitate the one-on-one type of engagement. There are also additional online and print reports to help educate customers about their energy use while providing tips and tricks to reduce and programs that may make the most sense for them to enroll.
3	11	None listed in section 1.3.	The IOUs should consider targeted efforts to offer IDSM information and support to customers seeking information via call centers.	All IOUs	Accepted	All IOUs currently offer these types of services to our customers today.
4	12	None listed in section 1.3.	We recommend timing marketing efforts to follow months where higher bills are more likely, and that marketing materials be designed to raise awareness of IDSM incentives and rebates, as well as benefits to the environment associated with DSM investments.	All IOUs	Accepted	Many programs offered by the IOUs follow seasonal based marketing techniques.
5	12	None listed in section 1.3.	The number one barrier for non-participants considering DSM solutions is upfront cost and concerns related to length of payback. We suggest the IOUs and CPUC work together to develop additional low-cost options for expanded participation in IDSM, such as shared solar investments and/or additional DR program options.	IOUs and CPUC	Accepted	The IOUs accept and look forward to engaging with the CPUC on ways to explore additional funding for customers beyond what is already offered today. Further the IOUs are developing creative ways to provide renewables to customers as a low cost option.

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6	12	None listed in section 1.3.	The IOUs should focus on ways to continuously engage customers with online tools, i.e. encourage multiple-visit usage of the audit tool.	All IOUs	Accepted	The IOUs are constantly monitoring the online activity and identifying ways of improving. Further, surveys are offered frequently to capture qualitative information from customers to make additional modifications.
7	12	None listed in section 1.3.	The Southern California IOUs should consider emulating PG&E by adding recommendations to the tool that cover all available residential DR programs and solar technologies (solar PV, solar hot water and solar lighting).	Multiple IOUs (specified in recommendation)	Accepted	All IOU's have online tools that are frequently advertised in customer communications, encourages return visits, and offers IDSM solutions.
8	13	None listed in section 1.3.	The IOUs should consider further customizing online tools and audit recommendations by DSM participation segment to best meet the unique needs of NEM and DR participants.	All IOUs	Accepted	The online tools today from each of the IOUs provide information to encourage the adoption of both DR and NEM solutions. *SoCalGas currently does not offer DR and NEM programs.
9	13	None listed in section 1.3.	Future research is needed to better understand the drivers of supply and the key features of successful IDSM delivery, for both residential and small commercial customers.	All IOUs	Accepted	All IOUs agree that additional research into this customer segmentation could be beneficial. All research is contingent upon the EM&V roadmap update and the CPUC's approval for proposed research.