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## Letter from the AESP Chair

I was hoping to kick off the first of my summer letters on a lighter note, but recent news out of the Environmental Protection Agency (EPA) have usurped any topics on travel, saving energy by camping out in your backyard or my advice on how to take your kids on a clean energy tour this summer (your kids can thank me later for skipping that topic). By now I am sure most of you are aware of the newly released EPA guidelines designed to cut carbon pollution from existing power plants by 30 percent by 2030.



**Sara Van de Grift**  
AESP Chair

The Clean Power Plan works to give states the flexibility to meet specific carbon reduction goals, and can include a mix of generation that includes energy efficiency and demand-side management. We know better than many that the cleanest kWh is the one that is never generated. Energy efficiency programs and energy efficient technologies delivered and developed by our members are ripe to play key roles in the successful achievement of these goals and provide a litany of proof that energy reduction, and economic growth are indeed items that go hand in hand. Our growing industry, the sustaining number of new members at our AESP events, the growth in membership over the last eight years, and each of you, are proof of that. For those of you too busy already doing this good work to read the full proposal, the EPA plan aims to:

- Cut carbon emission from the power sector by 30 percent nationwide below 2005 levels;
- Cut particle pollution, nitrogen oxides, and sulfur dioxide by more than 25 percent as a co-benefit;
- Avoid up to 6,600 premature deaths, up to 150,000 asthma attacks in children, and up to 490,000 missed work or school days—providing up to \$93 billion in climate and public health benefits; and shrink electricity bills roughly 8 percent by increasing energy efficiency and reducing demand in the electricity system.

No matter your stance on these rules, and despite the discussions and debates yet to take place, no one can deny the potential opportunity this could provide for those of us working in the energy efficiency, demand-side management and renewables industries for many years to come.

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*Wisconsin Chapter*  
 June 24 — Epic Tour  
 July 16 — Concerts on the Square  
 August 26 — Happy Hour

*Rocky Mountain Chapter*  
 July 10 — Xcel Energy's Transportation Initiatives  
 July 31 — switch~

*Southwest Chapter*  
 June 17 — Conference Call Meeting

*Ontario (Canada) Chapter*  
 July 9 — Event

*California Chapter*  
 August 5 — Lunch

*Chicago Chapter*  
 August 13 — Rooftop Party

### Brown Bags

*June 12*  
 Integrating Demand Response and Renewables

*June 19*  
 EPA's 111(d) Standards to Reduce Carbon Emissions from Existing Power Plants

*June 26*

## Teammates? Designing and Marketing A School-based Program

### AESP News

#### News Releases and Announcements

#### Industry News

*The following executive summaries of current news items were written for Strategies after being compiled from various news sources.*

#### **New Executive Actions Call For Energy Efficiency and Solar Energy** *EcoBuilding Pulse (05/09/14) Weeks, Katie*

Following the recent issuance of a National Climate Assessment that determined that adverse effects of human-induced climate change are already widely impacting life across the nation, President Barack Obama announced new executive actions that should lead to \$2 billion in energy efficiency investments, smarter appliances, and training programs to expand the U.S. solar industry by 50,000 workers by 2020. Obama also announced 300-plus private and public-sector commitments to promote energy efficiency and grow the solar industry by 850 megawatts of deployed solar capacity. Among the goals of such plans are an additional \$2 billion in energy efficiency upgrades to federal buildings over the next three years, the rollout of a High Performance Outdoor Lighting Accelerator to boost adoption and use of high-efficiency outdoor lighting in the public sector, and expansion of Fannie Mae, the Department of Housing and Urban Development, and the Federal Housing Administration's Green Preservation Plus program, which seeks to sustain quality affordable housing by encouraging investment in energy- and water-saving property investments. The U.S. building industry has promised to help reach Obama's goals and promote energy efficiency and solar capacity. Private initiatives announced by the industry include 22 new home builders' commitment to construct nearly 10,000 Zero Energy Ready Homes in collaboration with the Energy Department. Moreover, 25 new states, cities, school districts, merchants, and multifamily housing, food service, hospitality, and manufacturing organizations are joining the Better Building Challenge, with a pledge to enhance the energy efficiency of more than 1 billion square feet of space by at least 20 percent by 2020. Twenty existing Better Building Challenge participants also have vowed to tackle water efficiency, while seven new financial organizations have joined the challenge and pledged \$377.5 million to develop financing solutions and products to help promote energy efficiency upgrades in multifamily developments.

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#### **Energy Efficiency Bill Fails to Pass Congress** *CBSNews.com (05/16/14) Condon, Stephanie*

After months of behind-the-scenes work, a bipartisan group of senators managed to produce an energy efficiency bill with strong bipartisan support. However, the legislation was killed on May 12 by a filibuster reportedly spurred on by a Republican not even in office. Even though the Energy Savings and Industrial Competitiveness Act, sponsored by Sen. Rob Portman (R-Ohio) and Sen. Jeanne Shaheen (D-N.H.), had seven GOP co-sponsors including Portman, all but three Republicans voted to filibuster it. Scott Brown, the former Republican Massachusetts senator now seeking to unseat Shaheen in New Hampshire, reportedly urged his party to sink the bill in order to deny Shaheen that legislative accomplishment. Publicly, Republicans have said they opposed moving forward with the legislation because Senate Majority Leader Harry Reid (D-Nev.) refused to let the GOP offer a series of energy-related amendments to the bill on the Senate floor, including an amendment to approve the controversial Keystone XL pipeline. While Reid rejected that plan, he did promise Republicans a standalone vote on Keystone after the Senate finished voting on the Shaheen-Portman bill. Spokesmen for Brown and GOP leadership neither denied nor confirmed the report that Brown interfered with the bill. There is a chance the legislation could be revived. Sources from both sides of the aisle say lawmakers are trying to work out a resolution, but some say it may not come up again until after the midterm elections.

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#### **More Americans View Energy Efficiency as a Priority** *Pittsburgh Post-Gazette (05/06/14) Sanserino, Michael*

A new survey from the University of Texas finds that energy efficiency is a priority for 79 percent of Americans. The biggest motivator for energy efficiency is savings, according to the poll. "People pay attention to what affects them personally first," says Sheril Kirshenbaum, director of the UT Energy Poll. "Price seems to be the primary driver." Sixty-seven percent of those surveyed said they expect the portion of their household budget spent on energy to

Energy Efficiency Strategies to Tame the Big Data Center Beast

July 10  
Direct Install Programs

July 17  
[Brain Fire — Innovative Marketing Ideas From Outside Our Industry](#)

If you would like to organize a Brown Bag, please contact Kisha Gresham at [kisha@aesp.org](mailto:kisha@aesp.org).

#### AESP Training Courses

*Introduction to the Principles of Demand-side Management (DSM) or Introduction to the Principles of Evaluation, Measurement & Verification (EM&V)*  
San Francisco, August 4, 2014

*E2 — Level II Demand-side Management Economics & Evaluation*  
San Francisco, August 6-7, 2014

If you would like to schedule an onsite training please contact Suzanne Jones at (480) 704-5900 or [suzanne@aesp.org](mailto:suzanne@aesp.org). For more information about the AESP Institute, [click here](#).

#### Conferences

*Summer Conference Evaluators & Implementers: Merging on the Energy Efficiency Highway*  
San Francisco  
August 4-6, 2014

*25th National Conference*  
Orlando  
February 9-12, 2015

*Spring Conference 2015*  
Portland  
May 19-21, 2015

#### **WELCOME & THANK YOU to our New and Renewing Members!**

##### **New Members**

Anne Stephenson, Efficiency Maine Trust  
Ben Dickson, CB&I  
Brett Stein, Honeywell  
Brian Hickey Jr, Threshold Door to Door  
Cadi Saunders, Thorpe Services  
Christmas Ramirez, Xcel Energy  
Elizabeth Freeman, GE Lighting  
Emily Ruffing, Warm Thoughts  
Eric Gredell, CB&I  
Erin Fagnant, KSV  
IS Dunklin, Chartwell  
James Dodenhoff, DNV GL  
Jennifer Gillis, Efficiency Nova Scotia  
Jeremiah Schmidt, Honeywell  
Joan Glickman, U.S. Department of Energy  
Katherine Mitchell, CB&I  
Kevin Youngquist, EarthTronics  
Leila Banihani, CMC Energy Services  
Mark Yosowitz, ThinkEco  
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increase. Nearly two-thirds believe political "squabbling" is the biggest barrier to increased energy efficiency. Though approximately 80 percent of those polled said they viewed energy efficiency as a "priority," just 63 percent of people said they plan to seek more information about ways to decrease their energy use in the next six months. Most polled said the home appliance and retail industry was most to credit for the proliferation of energy efficient goods, while only 31 percent of respondents said the federal government made a significant contribution.

Despite the pessimism about the government and the belief in rising prices, more Americans believe the United States will be in a better energy situation 25 years from now than it is today. Thirty-six percent of respondents believe the United States will be better off in 25 years, compared with 29 percent who believe it will be worse. In the previous version of the poll, 27 percent believed the nation would be better while 38 percent believed it would be worse.

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### Open Data Could Unlock \$230 Billion In Energy Efficiency Savings

*Forbes (05/07/14) McMahon, Jeff*

Two founders of energy efficiency startups, Andy Frank of Sealed and Matt Gee of Effortless Energy, spoke May 6 at a forum hosted by the Energy Policy Institute at Chicago. They urged the creation of an open-energy data warehouse that would gather anonymous forms of existing data from various sources and make the data available for research, government, and industry. The needed forms of data, such as electricity usage, housing characteristics, renovations, and financing, are currently held independently by utilities, contractors, cities, and financiers. If such data were opened and merged, businesses could finance efficiency improvements more reliably and pay for the improvements with the savings, said Gee and Frank. Gee noted that California utilities spend \$40 million annually to estimate savings generated from efficiency improvements, but actual savings are neither verified nor integrated into the process. McKinsey and Company estimates the United States could save \$1 trillion by 2020 that is currently lost to inefficient energy use, of which about \$230 billion represents cost-effective savings that could be realized by improvements that pay for themselves if market hurdles were removed, according to Gee. He added that, "It really requires almost a grassroots and distributed effort to go and tell the utilities, the regulators especially, 'Look, this isn't good enough anymore. We're not going to [continue] spending our money on something that can't actually be verified.'"

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### How 26 States Created 85 Percent of America's Energy Efficiency Savings

*CleanTechnica (04/30/14) Marcacci, Silvio*

The 26 U.S. states that have energy efficiency resource standards (EERS) represent nearly all of the electricity savings secured nationwide in 2012, according to a recent report from the American Council for an Energy Efficient Economy (ACEEE). ACEEE broadly defines EERS as policy-setting mandatory energy savings targets for utilities and efficiency program administrators. The 26 EERS states aimed to save more than 18 million megawatt hours (MWh) of energy in 2012, but they achieved over 20 million MWh – equivalent to 85 percent of America's total energy savings in 2011. Assuming all targets remain in place through 2020, their combined annual electricity savings will equal 6.2 percent of overall US electricity sales. ACEEE says multiyear targets provide regulatory certainty beyond annual planning, encourage utilities to consider efficiency as a similar resource to generation, and allow testing of new programs to fine-tune approaches as target savings levels increase. "Energy efficiency is a cost-effective and reliable resource that deserves to be a significant part of every state's energy portfolio," says Annie Downs, ACEEE state policy research analyst. "Setting energy efficiency targets is smart policy that encourages utilities to help their customers save money...instead of spending even more money building unnecessary new power plants." Regulatory reforms can help encourage energy efficiency success, like program-cost recovery where utilities can recover investment costs by treating them as capital expenses, decoupling "lost" revenue from fixed costs independent of power sold on market, or performance incentives providing a risk-adjusted financial gain to meet growing power demand through increased efficiency instead of new generation.

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### A Battle Over Energy Efficiency Waged at Colorado PUC

*Denver Post (04/25/14) Jaffe, Mark*

Xcel Energy officials in late April told the Colorado Public Utilities Commission that energy efficiency savings are becoming more expensive, and requiring a robust efficiency program could lead to higher bills. Xcel residential customers pay an extra 1.35 percent on their total bill to pay for incentives, such as rebates on energy efficient appliances and compact fluorescent light bulbs. "This is a story of success," Xcel spokesman Mark Stutz said. "The low-hanging fruit has been picked." Many of the energy efficiency programs Xcel initiated are

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AESP is a member-based association dedicated to improving the delivery and implementation of energy efficiency, energy management and distributed renewable resources. AESP provides professional development programs, a network of energy practitioners, and promotes the transfer of knowledge and experience.

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#### Editorial Committee

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now widely adopted, so the utility wants to reduce their efficiency targets by about 50 percent over the next five years. "Xcel has consistently underestimated the cost of the program and exceeded the goals," said Howard Geller, executive director of the Southwest Energy Efficiency Project or SWEPP. The energy efficiency project urged the commission to raise the efficiency targets. Under a 2007 state law, investor-owned utilities, like Xcel, must find ways to reduce demand in return for financial incentives. In 2012, Xcel spent \$92 million on energy efficiency programs and received \$23 million in offsets and incentives. To meet the target of 411 gigawatt-hours of cuts in 2015 would cost \$115 million and that would rise to \$185 million in 2020 to meet the 549 gigawatts targeted for that year, according to Xcel. In those five years, \$962 million would be spent to save 2,914 gigawatt-hours. The Colorado Office of Consumer Counsel, which represents consumers and small business before the commission, has called for even deeper cuts in the efficiency program, calculating that the five-year cost of the program will be \$1.3 billion. "Rate impacts of \$1.3 billion are not acceptable," Consumer Counsel analyst Chris Neil said in testimony. Instead of cutting the target the SWEPP is calling for a 30 percent increase in the target. Accounting for the program costs — and Xcel's incentive payments — customers would still reap \$600 million in energy savings, Geller said, adding that "the low-hanging fruit may have been picked, there is new fruit growing."

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## Featured Articles

### Gamification and Energy Efficiency — Competitors or Teammates?

by Lynn Belken



The word "gamification" has been tossed around a lot lately. And many think it can be the home run to

getting customers to engage with your product or brand. But let's not get ahead of ourselves here. First, let's do a little scouting on this gamification prospect.

Gamification is the strategy of applying game design thinking to a nongame context to improve user engagement and solve problems by making it more fun and engaging. The idea is to take a business problem and add game elements to it in order to solve a problem. When a game element is added to the experience, it fosters creativity and makes people feel good about the problem solving. Typically the three standard game mechanics used are dashboards/leaderboards, points, and badges. These elements let players compare themselves to others and provide a reward for doing the action.

While the term gamification is new, the idea itself is not; it's been around for quite some time actually. Organizations like the Boy Scouts and the Girl Scouts have been using the idea of earning badges to motivate, engage, and teach their members for decades. The airlines were also among the first to use the point-earning tactic (i.e. earning miles) with their loyalty programs. Other industries jumped in on the loyalty program idea as well, including restaurants,



Tracy Narel, Board member  
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retailers, and hotel chains.

What's new about gamification is its goal of motivating people with virtual awards, like earning badges on FourSquare and becoming the "mayor" of a location. These badges have little or no monetary value, yet are very motivating for players. Other forms of gamification tap into people's competitive natures and sense of play to lend a game-like feel to everyday tasks and experiences. For instance, fitness apps help motivate users to exercise more with rewards and achievements, goal tracking, and social competitiveness.

#### **Season Opener: Gamification vs. Games**

At its core, gamification is about using game elements (like points) to engage people on an emotional level and motivate them to achieve specific goals (like filling out expense forms on time or participating in utility DSM programs). According to Brian Burke, author of the book "Gamify — How Gamification Motivates People to Do Extraordinary Things": "If a business can identify the goals it shares with its audience or provide its audience with goals that are meaningful to them, then it can leverage gamification to motivate these players to meet those goals, and the company will achieve its business outcomes as a consequence."

Serious games, by contrast, are games with an explicit purpose — like motivating households to reduce their electric usage or teaching people about energy distribution systems.

Both gamification and serious games can be used to motivate change and sometimes the line between the two strategies is blurry. Typically, games have clear timeframes while gamification is ongoing and most of us encounter gamification in our lives more often than serious games.

The bottom line, though, is that either strategy can make complex topics, like energy efficiency, compelling and fun — which increases overall participation and engages people on a deeper level so that programs achieve stronger results. Either approach can also yield long term results if designed properly. To determine how serious games and gamification might play with energy efficiency, I talked with some companies that have stepped up to the plate.

#### **And the pitcher throws a fastball**

If you attended the AESP National Conference in San Diego, you were invited to take part in the conference contest app by Ringorang which used behavior science and gamification techniques to keep people coming back to critical information repeatedly. When offered to customers, the app engages and educates on various energy efficiency issues and programs by sending "surprise" questions to their mobile devices and computers. Customers can play live or play later, and earn points and prizes by answering. The AESP exhibit hall in San Diego was buzzing with people simultaneously talking about and playing the game each evening.

Each question is about a single piece of information and can drive the user to other source material. In general, of those who participate, approximately 50 percent will engage with the app weekly, when it's an optional program (mandatory programs have higher engagement), with 30-35 percent engaging ten times or more each week. Instead of a single campaign or burst of information (like many traditional marketing tactics), the app provides a continuous flow of information. And the utility controls the cadence so users don't "burn out."

Since customers who use the app are reinforcing knowledge, skills and attitudes multiple times a week, they are engaging their long-term memory recall. Ringorang has shown an average 7-15 percent lift in education every month on a variety of topics — from simple tips around the house to what kind of equipment to buy, etc., with users reporting on their various changes in behavior as a result. Integrating the app into a well-crafted overall engagement strategy helps program managers not only achieve goals, but also creates audiences looking for more offerings down the line.

#### **The pitcher winds up and throws a curve ball**

Cool Choices is a nonprofit that leverages group social dynamics and gamification to motivate environmentally sustainable practices. They aim to make sustainable actions fun, social and easy, through employee engagement programs implemented in partnership with businesses and public entities.

In designing their game, Cool Choices reached out to game developers for assistance. A key insight was that game developers tend to think about long-term engagement — how to inspire people to play a game multiple times. In the energy efficiency world, by contrast, we typically recruit customers to participate in a single program versus keeping customers engaged so that they participate in multiple programs. Most programs might thank a customer for participating but few celebrate customer actions (no matter how small), and then suggest additional actions. Cool Choices is different; they catch people doing the right things and celebrate those actions to encourage participants, and their peers, to do more. And the approach is working.

An interesting outcome for Cool Choices is that their participants talk about the nonenergy

benefits of conservation, such as rediscovering conversation with their families by turning off the TV. These participants connect sustainable habits to a higher quality of life. Cool Choices can also show broad and deep participation. In some cases 60 percent of employees in a company participate in the game. At one company, two-third of participants played at least half of the days during an eight-week game — that means more than half the time they reported at least one sustainable action they had done that day.

#### **Seventh Inning Stretch: More players will join the ranks**

Ringorang and Cool Choices are not the only players at bat. Opower teamed up with NRDC and Facebook and created a game that awards badges to customers when they reduce their energy consumption and see how their energy use stacks up against friends, neighbors, and homes across the country. Simple Energy and Apogee have developed platforms that contain rewards and points and integrate with utility websites. Additional players will continue to work their way up from the minors. Technology consultancy Gartner has projected 50 percent of corporate innovation will be “gamified” by 2015.

The elements of gaming are now everywhere. As a person reaches a goal, he earns a badge or trophy. The more of the desired action you take, the more points you get. Gamification builds self-esteem and reinforces it with peer recognition, which can be a powerful means of unlocking motivation. Whether or not games will help change the world remains to be seen, but they can be a powerful tool to bring out the competitive edge in many customers, and entertain them while educating them on complex topics like energy efficiency, sustainability, and climate change.

*Lynn Belken, owner of Lynnergy Consulting, is a social media and marketing adviser with more than 12 years of experience within the energy efficiency industry.*

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## **Designing and Marketing A School-based Program**

by Mac Scott



There are many unique aspects to designing and marketing K-12 school-based programs that present both challenges and opportunities. Administrators, teachers, students, families, PTA/PTOs and many more stakeholders come together to form a community with a well-defined goal of nurturing a successful future for young people. Identifying the characteristics of this distinct audience, the obstacles faced in reaching them and how to overcome those obstacles are crucial to a successful school-based program.

Teachers, students and administrators are the three primary targets of initial marketing efforts in most school-based programs. Each of these sub-groups will have a unique set of ideal outcomes from participation and a well designed program will support the goals of all of them. Whether a program is school-wide or targeted at a specific grade level, administrators will often have the same concerns. Administrators and more specifically principals will want to make sure any program is safe and a more beneficial use of time than the usual classroom schedule. Time in the classroom is valuable, and both teachers and administrators are likely to be very protective of it. A teacher's time is equally as valuable, so a program must be an



Mac Scott

efficient use of that time and very easy to implement. In contrast, the most important program aspects revolve around fun and engagement. Student buy-in is just as important as buy-in from teachers and administrators. Students are the ones who will experience the strongest impact from a good school-based program, especially when participating is something they want to do rather than something mandated by their teachers.

Whether a school is a public, private, or charter school, the characteristics they share make it possible to identify challenges that are universal regardless which category they fall under. Gaining credibility with any school is the first necessary step to successfully running a school-based program and it is often one of the most difficult. It can be tough to design a balanced program to garner ideal outcomes for both the program sponsor and the school. Finding ways to reach program goals while reinforcing existing concepts already being taught in the classroom is essential. Schools have a unique schedule that has a strong impact on both program design and marketing. The academic calendar is unique and teachers work a very different schedule than the typical day-to-day of corporate America. It is important to recognize that schedule and cater to it. Testing, holidays and breaks are just a few design and marketing factors that need to be taken into consideration when scheduling program implementation or promotions. It can be challenging to get contact information or find ways to reach teachers and administrators with program promotions. Schools are understandably protective of this information and faculty is often understandably skeptical of most marketing campaigns due to the high volume of them that schools receive each year. A program must stand out in content and quality, otherwise promotional efforts will end at the secretary's desk.

Overcoming the challenges presented when working directly with schools is possible by paying close attention to curriculum standards, school schedules, school-specific methods of marketing and communications. Curriculum standards vary from state to state and knowing those standards is key to designing a quality, trustworthy program. Many states follow the Common Core standards or Next Generation Science Standards and some states have their own standards and knowing the standards could be the difference between a teacher or principal being able to justify implementing a program at the school or not.

A teacher or a principal who hopes to implement a program will have a much easier time getting proper permission if it is easy to demonstrate that the program will benefit students and their families. Having the endorsement of a state department of education is a wonderful way to prove that a program is worthy of implementation in the classroom and strong curriculum ties are the fastest way to receive that endorsement.

Avoiding scheduling conflicts is straightforward but requires a fair amount of research. Avoiding these conflicts is also essential to program design, marketing and implementation. If there are limited program dates available for schools, those dates can't conflict with spring break, education weeks, teacher planning days, holidays and testing. These dates will always take precedence on a calendar over any program offered, especially testing. Teachers work hard all year to prepare students for tests and through years of experience and talking to teachers it has been determined that it is advantageous to avoid scheduling programs within a few weeks of testing. Schedules can be different from district to district and coordinating these schedules can be difficult but it is absolutely necessary. To effectively reach teachers, program promotions must be conducted in coordination with their daily schedule in addition to the school schedule. Strategic timing is everything with teachers. For example, if phone marketing is necessary for a program, you can't call a teacher in the middle of the day when they are in class. Again, this takes research and effort but is absolutely necessary to avoid having promotions fall on absent ears.

Reaching teachers and principals with promotions requires purposeful design, timing and proper channels of communication. Traditional channels are typically more effective for direct marketing to schools than viral style campaigns. A teacher or principal must be able to easily identify what the program is and why it will benefit the school or the promotion will be discarded before it is ever read. Letters to administrators and teachers, teacher emails, postcards, phone calls and in extenuating circumstances, personal visits have proven to be effective staples in school marketing. Secretaries are often the gatekeepers at the school who decide whether or not promotions make it to their intended target. They are the ones who distribute mail and transfer calls to teachers. If they determine marketing efforts resemble spam, the likelihood of reaching the intended target significantly decreases. The first person at the school to see a promotion needs to immediately recognize that the program will directly benefit students. Schools employees have a different set of rules they must follow online than many other professions. In many workplaces, employees are constantly connected to email and social media but that is not the case with teachers and other employees at schools and many of these employees will prioritize privacy over having an online presence. That makes popular channels of marketing, such as Twitter and Facebook, nearly obsolete for marketing school-based programs.

By taking into account the challenges involved with school marketing and implementing strategies to overcome those challenges, the ball is set in motion to have a successful, long-term program. When a program is designed with that simple goal in mind, the two best types of marketing to schools take place, reenrollment and word of mouth. Teachers will repeat the

same program every year if it helps them reach their own classroom goals, they then tell their colleagues about participating in a successful program — and that leads to organic program growth.

*Mac Scott is a proud graduate of the University of Utah and is currently the Marketing and Communications Manager for National Energy Foundation.*

## Unlocking Effective DSM Trade Ally Engagement: Streamlining Communication, Reducing Cost, and Driving Energy Savings

by Tracy Stoner and Joel Riciputi



Joel Riciputi



Tracy Stoner

How do you measure the effectiveness of your trade ally engagement strategy? Do you invest in expanding the number of allies in your network or increasing the level of activity and participation within your existing network? As utility DSM program and portfolio managers face the dual challenges of increased savings goals and reduced administrative budgets, they increasingly look to trade allies for assistance. The results are often mixed as they grapple with the work of recruiting and managing a

diverse set of service providers with motivations often different from the utility itself.

Best practice approaches for DSM trade ally engagement can be achieved by understanding the strengths of the trade allies in your specific networks, developing effective engagement strategies to raise their capabilities, and leveraging purpose-built software to demonstrate key metrics of the network's performance and help streamline trade ally engagement. This combination enables utilities to reduce program administrative costs, drive trade ally and customer participation, gain visibility into the savings pipeline, and reinforce customer service initiatives.

One of the largest utilities in the U.S. decided to bring a strategic approach to implementing and maintaining their trade ally network. With over 1600 trade allies, it was essential that the utility program managers transform their approach to trade ally engagement. Nexant's iEnergy® Trade Ally was deployed to help promote energy efficiency programs and enable adoption through active participation of service and equipment providers. The software enables management of a database of qualified network members and makes it available for the utility and its power distributors to share information with their customers. By doing so, customers are connected to trade allies who are in turn connected to the utility's back office operations. This has helped transform how the utility runs, manages, and maintains their trade ally network. For example, more than 50 percent of visits to the dedicated trade ally network portal are return visitors and over 45 percent are new. Both metrics are important as they demonstrate that many of the utility's trade allies are power users and return consistently to take advantage of tools such as training and program information. This also demonstrates that the trade ally network is continuing to grow and the utility is successfully driving new traffic to their portal by deploying program outreach and education — ultimately contributing to the success of the utility's DSM and energy efficiency programs.

For utility program managers, an effective trade ally network is essential to cost-effective energy acquisition and program reach. Through a well-functioning trade ally network and enabling software systems, utility managers can close the energy savings loop — tying utility customers to trade allies and trade allies to DSM program operations and management. In order to ensure this happens, managers need to be able to effectively recruit, engage, and manage contractors and vendors to fully participate in DSM programs, thereby helping to meet compliance, customer service, and energy savings goals.

An example of a utility successfully designing and implementing an effective trade ally strategy is Santee Cooper's Reduce the Use program. Santee Cooper is a state of South Carolina-owned utility serving both wholesale and retail electricity customers. The retail customers that Santee Cooper serves are part of a largely seasonally driven nonresidential market. The existing contractor base in this market is limited partly because of the seasonal nature of the market. In addition, this contractor base has had limited experience and exposure with energy efficiency technologies and practices. Santee Cooper's trade ally program tackled the specific needs of this market. In addition to the traditional design elements of a trade ally program, Santee Cooper focused on innovative and creative trade ally engagement, technology and energy efficiency sales training, and detailed project inspections and project tracking, management assistance and forecasting.



Santee Cooper's Reduce the Use Program hit 206 percent of targeted savings in 2012 and 214 percent in 2013. In addition to exceeding their savings goals for the past two years, Santee Cooper has built a robust and engaged trade ally network.

Quality trade ally engagement encourages customers to learn about and participate in energy efficiency, renewable energy and demand response programs. This in turn saves money by providing persistent energy saving solutions for homes and businesses, resulting in higher rates of customer participation and satisfaction. Trade allies can drive expanded business opportunities and promote energy efficiency by participating in a utility's trade ally network. Additionally, effective trade ally involvement in DSM programs has a positive impact on the local community and can result in market transformation factors that include sustainable energy efficiency practices, economic development, local job creation, and positive utility promotion.

Leveraging an effective engagement and systems-enabled approach is a proven method for addressing the dual challenges of increasing savings goals and reduced administrative budgets.

An online application process significantly reduces the time and cost to enroll new partners while ensuring data accuracy and integrity. The automation of this process helps to ensure qualification of energy efficiency projects and reduces errors in rebate and incentive payments. Similarly, utilities can offer a variety of education, awareness, and training tools and opportunities to support trade allies in becoming a member of the network, maintaining membership, and learning about the latest residential, commercial, and industrial energy saving programs and incentives they offer — all in one place. A centralized system ensures easy access by customers to pre-screened providers that fit their project needs, helping to reduce administrative complexity and cost.

The design and implementation of SRP's trade ally program required detailed segmentation of trade allies to identify high potential performers to ensure maximization of limited program resources. SRP is located in Phoenix, Arizona — an area with high exposure to energy efficiency combined with high competition for resources and trade ally engagement. Trade ally resources require daily, weekly and bi-weekly interaction and enrollment of a broad base of trade allies. It is essential that trade ally activities are highly integrated with rebate processing and other program delivery operations considering over 95 percent of all incoming rebate applications are submitted by trade allies directly. Automating trade ally and program delivery tasks ensures timely information and maximum efficiency in order to cost-effectively deliver energy savings and meet marketplace service expectations.

What is your strategy for engaging trade allies to ensure you meet your DSM portfolio energy savings goals? Now is the time for utilities to put in place cost-effective and efficient trade ally engagement and management in order to address the challenges of increased savings goals and reduced administrative budgets — to close the energy savings loop. As described in this article, there are proven methodologies, best practices, and software systems to help effectively recruit, engage, and manage contractors and vendors to fully participate in DSM programs, thereby helping to ensure compliance requirements and energy savings goals are met.

*Tracy Stoner is project manager for trade ally delivery and Joel Riciputi is director of product and solutions at Nexant.*

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## AESP News

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### Implementers and Evaluators, the AESP Summer Conference is for you

AESP's Summer Conference is all about ways that implementers and evaluators can work smarter, both individually and together, to achieve energy savings goals. The conference will kick off with Ralph Cavanagh from the Natural Resources Defense Council, who will reflect on the 35-year progress of energy efficiency in America, and NRDC's role with electric and natural gas utilities. The agenda features over 25 sessions focused on the latest innovations in program implementation and evaluation. [Register now](#) for San Francisco this August 4-6!

### Making sense of DSM, EM&V and E2

AESP will be offering three invaluable training courses this August in San Francisco. If you're coming for the AESP Summer Conference, why not come earlier or stay another day, and also attend a training course.

**Introduction to the Principles of Demand-side Management (DSM) or  
Introduction to the Principles of Evaluation, Measurement & Verification (EM&V)**  
August 4 (\$495 for AESP members, \$545 for nonmembers)

**E2 — Level II Demand-side Management Economics & Evaluation**

August 6-7 (\$695 for AESP members, \$795 for nonmembers)

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**News Releases and Announcements**

Comverge launches eBook "The Evolution of Communications for Demand Response."

BGE and Harford County Public Schools Team Up for Significant Energy Efficiency Savings with BGE's Smart Energy Savers Program.

PECI and Energy Center of Wisconsin Team Up to Train Local Businesses to Save Energy.

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