

What You Should Know Before Starting an EE/DSM Program

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Building your program

- Coming to energy efficiency
- Who's involved
- Initial research
- Identifying the correct programs
- Staffing
- Putting the plan into action

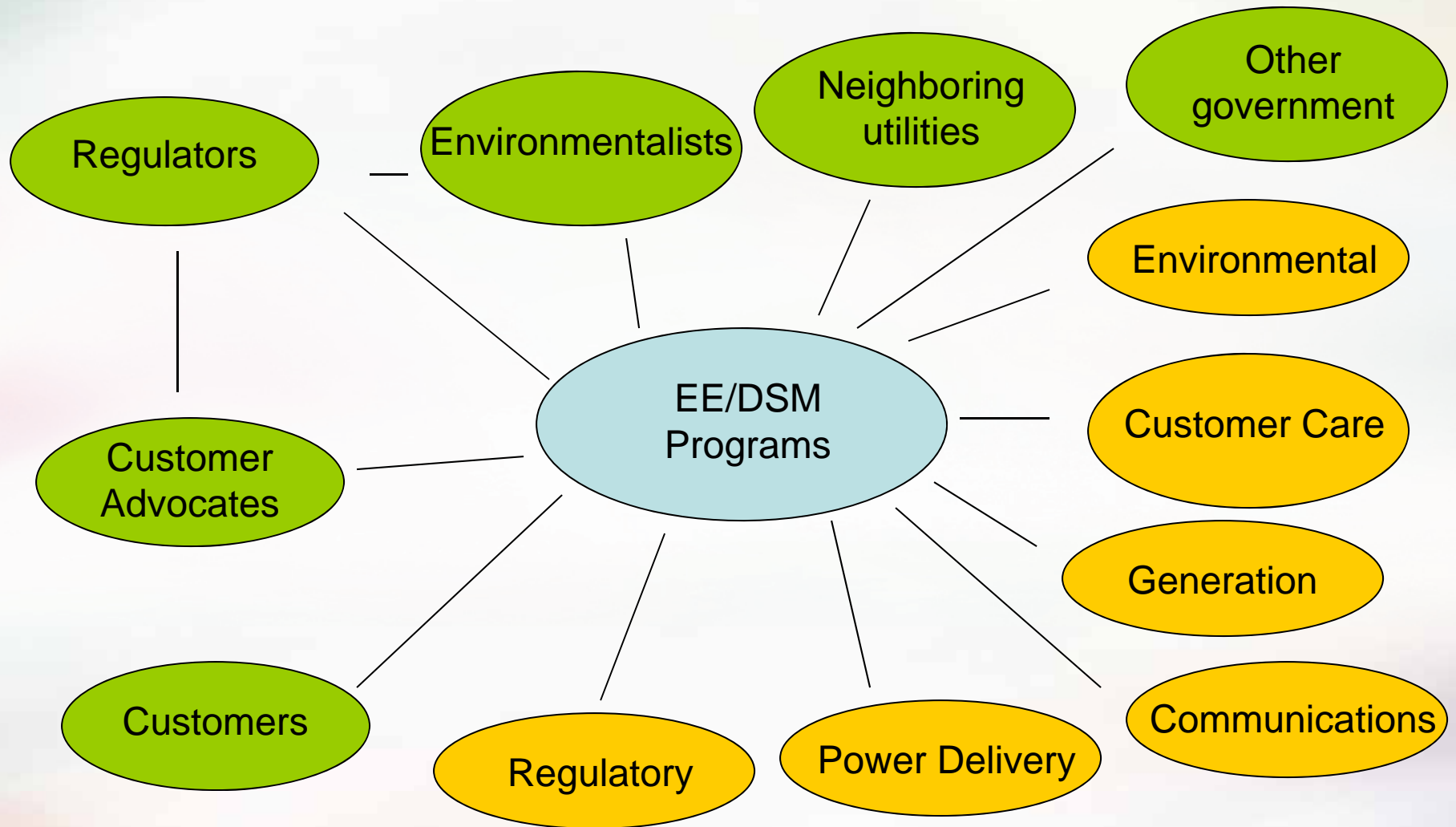
Comprehensive Energy Plan

- Main components
 - Detailed plan to address demand growth over next decade
 - Traditional infrastructure – plants, lines, etc.
 - Renewable energy
 - Energy efficiency and demand side management
- Filed with regulator, published openly, sent to key constituents

Why energy efficiency

- Address growth in demand responsibly
- Engage consumers in energy future
- Provide customers a choice
- Delay need for new power plants

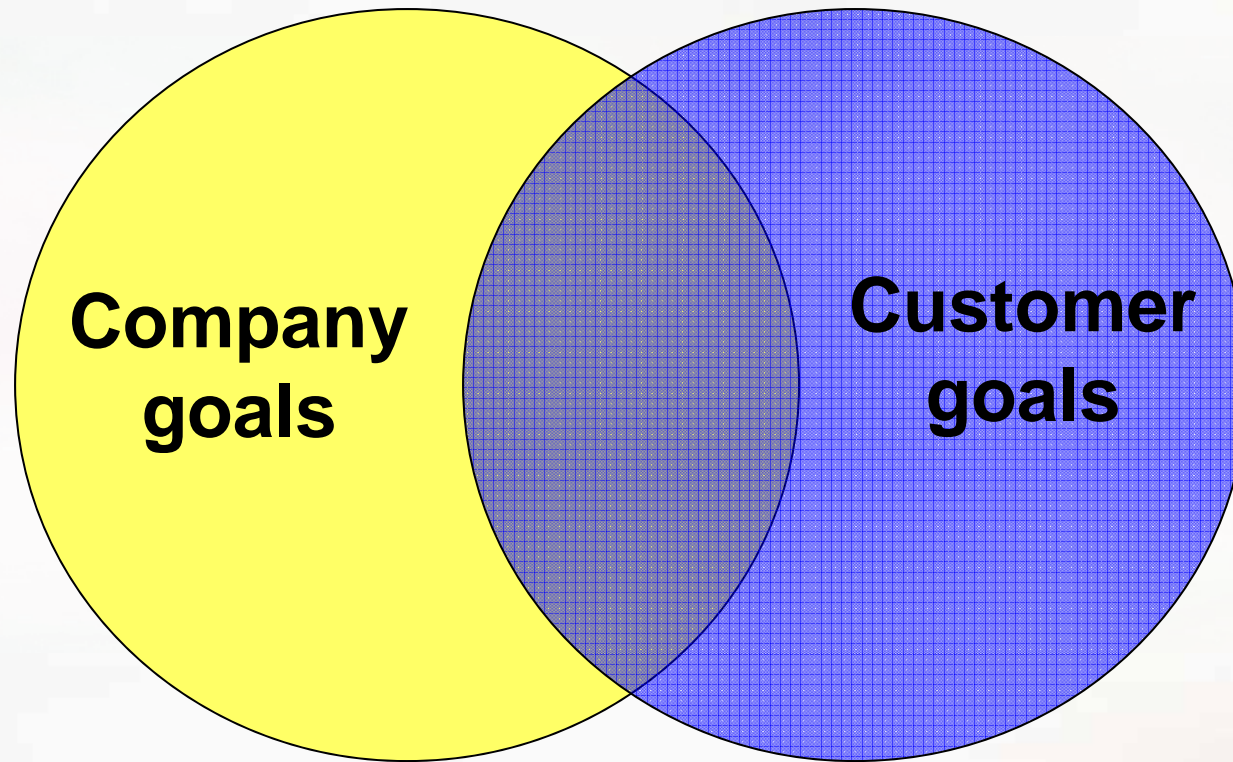
Interested parties



Regulatory

- Kick-off meeting with commission staff
- Periodic updates
- Open exchange of ideas and information
 - Collaborative approach
 - Buy in
 - Different perspective
 - Before implementation

Determining programs



Determining programs

- Company strategic plan
- Consultants
- Customer surveys
- Focus groups
- Other utilities
- Constituent input

Nuts and bolts

- Learn about the RFP process and how to write a clear RFP
- Multi-disciplinary task force
- Budget development and updating
- Goals and deadlines for roll out
- Clear objectives
- Measurement plan in place

Request for Proposal Process

- Identify your needs
 - Major functional areas of the proposed program - i.e., what “work” needs to be done?
- Identify your internal resources
 - Time, staff, capabilities
- Decide whether to outsource or not

Request for Proposal Process

- Start with the end in mind
 - “What” do you want done?
 - “How” do you want it done (QA)?
 - Program design?

Request for Proposal Process

- Decide who to send the RFP to based on:
 - Research
 - Benchmarking other successful programs
 - RFI

Request for Proposal Process

- Writing the RFP
 - Company overview
 - Contractor role – Scope of Work
 - Desired results
 - RFP process
 - Timelines
 - Minimum requirements

Request for Proposal Process

- Information report format
 - Pricing
 - Experience (i.e., relevant projects)
 - Order

Request for Proposal Process

- Vendor selection
 - Rating criteria / scoring matrix
 - Who will read and rate all proposals?
 - Conflicts of interest?

Request for Proposal Process

- Final steps
 - Develop a short list
 - Vendor presentations
 - Check references
 - Final selection
 - Notify all RFP respondents

Request for Proposal Process

- Miscellaneous
 - Stipulate maximum number of pages
 - You have the right to reject all bids
 - Select the bidder with the highest score
 - What if there are other issues?

Staffing

- Hiring takes longer than you think
- Working with Human Resources
- Time for training and establishing knowledge base

Acclimating staff

- Potentially high-stress environment
- Brand new department
- New personalities
- Different work styles
- New projects

Rolling it out

- Media campaign/program literature
- Employee meetings and education
- Trade shows – face to face interaction
- Alliances
- Execution

Tweaking

- Messages
- Tactics
- Budget
- Objectives
- Thinking ahead

Questions?

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