



Consortium for Energy Efficiency

15th Annual Industry Partners Meeting

September 19-20, 2018

New Orleans, Louisiana

InterContinental Hotel



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As a business confidential record of the Consortium’s activities, this Meeting Book is not to be distributed outside the current CEE Membership and invited guests.



Consortium for Energy Efficiency, Inc. Guidelines for Program Meetings

These Guidelines set forth policies and procedures regarding program meetings of Consortium for Energy Efficiency, Inc. (the "Consortium").

Section 1.0 Statements of Policy.

Section 1.1 General.

This Guideline applies to any meeting convened by the Consortium regarding its programs. A separate Antitrust Guideline previously adopted by the Board of Trustees remains the policy of this Consortium and is in addition to this.

Section 1.2 Objectives; Process; Outcomes.

The Consortium's program committees perform the vital work of exploring and developing Initiatives of the Consortium for proposed adoption by its Board of Trustees, monitoring the implementation and impact of the adopted Initiatives, and recommending proposed amendments to adopted Initiatives. All Program committee determinations are intended to be reasonable and objective based upon diligence and, where appropriate and practicable, peer review.

Section 1.3 Views Of Interested Parties.

It is the intent of the Consortium that the views, opinions, and expertise of all parties interested in the work of the Consortium shall be available to the committees in order to fairly evaluate all proposed actions relating to such work. It is also the intent of the Consortium that no Conflicted Committee Attendee (defined below) shall:

- (i) vote upon any committee action;
- (ii) obtain a competitive advantage in possible Requests for Proposals by CEE or its members in pursuit of the work of the committee; or
- (iii) use any information obtained through participation in the committee to solicit CEE members for grants or contracts for consulting or administrative services on the subject matter of the committee.

Section 2.0 Definitions.

"Affiliate" shall mean any individual or entity directly or indirectly controlling, controlled by, under common control with, or which employs or engages as a consultant, a Committee Attendee.

"Chairperson" shall mean the Chair, or in the case of Co-chairs, either one of them, of a program committee.

"Committee Attendee" is any person attending a meeting of a committee convened by the Consortium.

"Conflicted Goods or Services" shall mean goods or services which: (i) are the subject of any activity or initiative of the Consortium, whether in the exploratory or subsequent stage; or (ii) are the subject of any contract solicitation by the Consortium for consulting, administration, or other support of the Consortium's activities.



“Conflicted Committee Attendee” means any Committee Attendee who has, or whose Affiliate has, a financial interest in either: (A) the manufacture, sale or distribution of Conflicted Goods or Services, or (B) the solicitation or performance of grants or contracts for consulting or administrative services on the subject matter of the committee.

Section 3.0 Agenda, Minutes and Compliance with Guidelines.

An agenda shall be prepared for each and every meeting of a committee and minutes shall be recorded and distributed to each Committee Attendee. The Chairperson of the committee shall be responsible for monitoring each committee meeting for compliance with the Consortium's antitrust guidelines and these guidelines.

Section 4.0 Disclosures of Affiliation, and Interest.

Each Committee Attendee shall make explicit disclosure prior to the commencement of business of any committee meeting:

- (i) the name of such attendee's employer and the name of the entity, if different, such attendee represents at such meeting; and
- (ii) whether such attendee is a Conflicted Committee Attendee as defined above.

If at any time subsequent to initial disclosure the attendee becomes a Conflicted Committee Attendee, such person shall immediately notify the Chairperson of the committee of the conflict. It shall be the obligation of each Committee Attendee to provide full, fair and truthful disclosure to this Consortium of the matters described herein and any failure of a Committee Attendee to make such disclosure may be considered by the Consortium as grounds for exclusion of such person from Consortium activities.

Section 5.0 Committee Determinations for Advisory Action.

5.1 General.

Committee actions are advisory in nature since all final determinations of the Consortium on program matters is reserved to the Consortium's Board of Trustees. Except as specifically provided in these Guidelines, the format and conduct of meetings of any committee shall be as deemed appropriate by the Chairperson of the committee. The Chairperson of each committee shall make final determination of voting, if any, or consensus. Any Committee Attendee(s) desirous of presenting a dissenting or minority report on any committee recommendation may present the same to the chairperson of the committee who shall, in turn, report it to the Board.

5.2 Conflicted Member To Abstain.

A Conflicted Committee Attendee shall not be counted in any vote, consensus, or minority report in connection with a determination of the design, adoption or rejection of any initiative, specification, efficiency tier, program element, or any contract solicitation or award, or other activity conferring an economic advantage upon Conflicted Goods or Services.

5.3 Recusals.

In the case of meetings at which the committee is expected to make determinations of tier levels, program specifics, specifications or terms and conditions of RFP's, the Chairperson of a committee meeting shall have the discretion to request any Conflicted Committee Attendee to leave any portion of the meeting. In the case of meetings which are exploratory in nature, at which no final vote or decision is to be made, and which are



intended to lay the foundation for future planning, the Chairperson of the committee may allow the participation of Conflicted Committee Attendees up to the point of decision-making of the type described above.

Section 6.0 Duties of Committee Attendees.

6.1 Nondisclosure of Proceedings.

It is understood that Committee Attendees will be reporting to others in their own organization, or the organizations they are representing, and the obligations of nondisclosure shall be observed by anyone receiving such report. Every Committee Attendee shall use the same reasonable precautions as are taken with respect to business-confidential information of his or her own business or employer, to not disclose to anyone other than a person employed by a Member of this Consortium any of the proceedings of the Committee prior to release of such information by this Consortium approved by the Executive Director.

6.2 General Obligations.

Collegiality and unity of purpose are hallmarks of the work of the Consortium's Program committees. Accordingly, Committee Attendees are expected to observe the commonly understood principles of team play, including the following general obligations. Committee Attendees are expected to use the information obtained at committee meetings in a way which is not inconsistent with the mission of the Consortium or its business opportunities. Strategic or tactical action items arrived at in committee meetings will be implemented by Consortium staff, unless otherwise specifically designated by the Chairperson of the committee to someone else.

6.3 Removal of Committee Attendee.

The Chairperson of the committee may remove any individual from the committee based on noncompliance with these Guidelines.

Section 7.0 Confidential Market, Sales and Product Information.

Every Committee Attendee making a presentation to a committee meeting, or submitting correspondence to the Consortium, accepts at his or her own risk the possibility of disclosure by other Committee Attendees of such information, and the Consortium undertakes no obligation of nondisclosure or confidentiality with respect to such information. A Committee Attendee may, in direct communication with the Executive Director of the Consortium, request in advance that information identified in writing by the submitter as confidential shall be treated by the Consortium as business confidential and not be used or disclosed to any committee or used by the Consortium for any purpose other than the business of the Consortium. The Consortium shall not be obligated to hold any such information in confidence except as may be specifically identified in a written Nondisclosure Agreement executed on behalf of the Consortium by the Executive Director.



Transportation to the InterContinental Hotel

444 St Charles Avenue, New Orleans, Louisiana, 70130

From the Airport:

Louis Armstrong International Airport (MSY): Please reference the table below for travel options and the estimated cost and travel time associated with each. More information on the travel services listed can be found [here](#).

Method	Cost (estimated)	Time (minutes)
Taxi	\$36	30
Airport Shuttle	\$24	60
Rental Car	varies	15
Public Transit (E-2 Bus Line)	\$2-5.25	60+
Transportation Network Companies	varies	30

Public Transportation

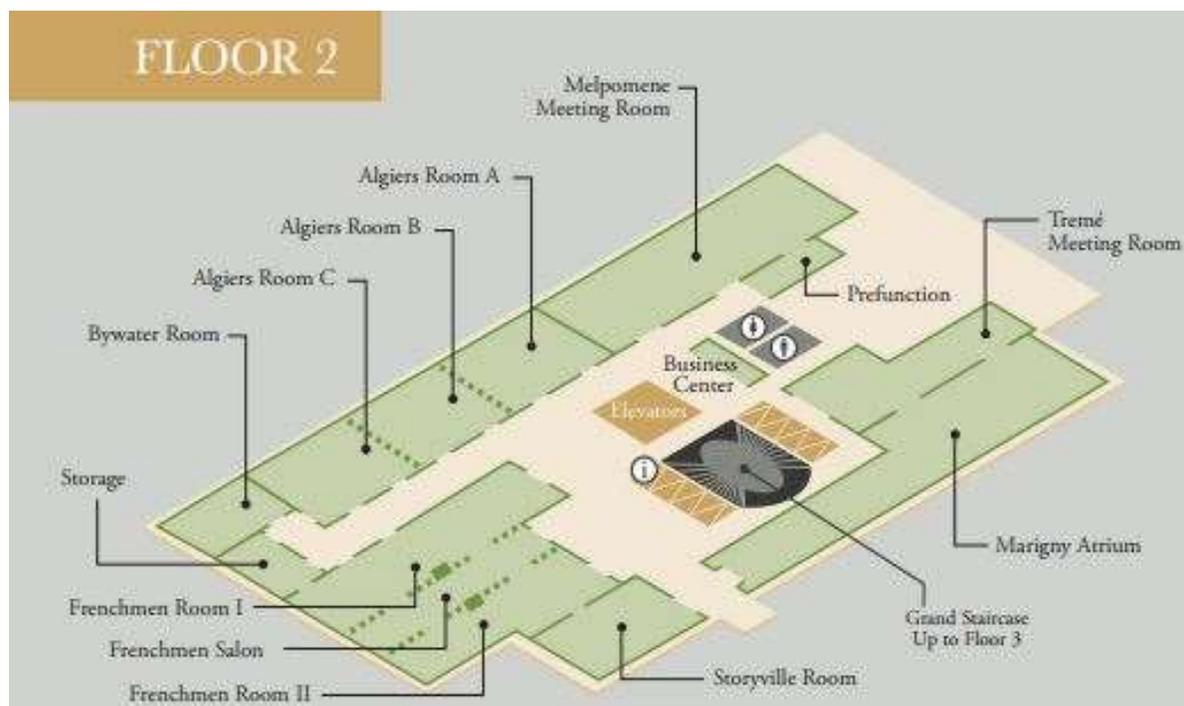
The E-2 bus line will bring you to downtown New Orleans seven days a week, with the line ending at the intersection of Loyola Ave and Tulane Ave. The quickest option from there, is a 0.6 mi walk to the hotel. Continue down Tulane Ave, which turns into Common Street. After five blocks, take a right on St Charles Ave and after two blocks, the InterContinental will be on your left. Google Maps walking directions from the E-2 bus stop at the intersection of Loyola Ave and Tulane Ave can be linked [here](#). Bring cash for your bus fare.

On weekends and after 6:52 PM CST on weekdays, E-2 service ends at the intersection of Tulane Ave and Carrollton Ave. From there, you can take the 39 bus lines to Saratoga Street and Tulane Ave. You can follow the same walking directions listed above to get to the hotel from this point.

Parking

Parking is \$42 per day.

Meeting Room Floor Plans





CEE Staff Contact Information

Corporate Team

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<h2 style="margin: 0;">Tuesday, September 18</h2>

- 7:30 a.m. – 5:00 p.m. Check-in [La Salle Pre-function, 3rd Floor]
- 7:30 a.m. – 8:30 a.m. *Breakfast*
- 8:30 a.m. – 4:00 p.m. SEM Workshop – Invite Only [Acadian I & II]
- 1:00 p.m. – 5:00 p.m. The National WWII Museum Visit [depart hotel lobby 1:00 p.m.]
- 5:30 p.m. – 6:30 p.m. *Welcome Hour [La Salle and Pelican Pre-function 3rd Floor]*

<h2 style="margin: 0;">Wednesday, September 19</h2>

- 7:30 a.m. – 5:00 p.m. Registration [La Salle Pre-function, 3rd Floor]
- 7:30 a.m. *Breakfast*
- 8:30 a.m. General Session [La Salle Ballroom A]
- 10:00 a.m. *Networking Break*
- 10:30 a.m. Concurrent Session I
 - Residential Committees: Integrated Homes I [La Salle Ballroom C]
 - Commercial and Industrial Committees: Strategic Energy Management and Connected Buildings I [La Salle Ballroom B]
- 12:30 p.m. *Lunch*
- 1:30 p.m. Breakout Session I
 - Residential Lighting Committee [Acadian I & II]
 - Gas Committee and Emerging Technologies Collaborative [Poydras]
 - Strategic Energy Management and Commercial Whole Building Performance Committees [Pelican I]
- 3:00 p.m. *Networking Break*
- 3:30 p.m. Breakout Session II
 - Connected, Residential HVAC, and Residential Water Heating Committees [Pelican II]
 - Gas Committee: Steam Systems Exploration [Poydras]
 - Motors and Motor Systems Committee: C&I Pumps Working Group I [Pelican I]
 - Commercial Lighting and Commercial Whole Building Performance Committees [Acadian I & II]
- 5:30 p.m. – 6:30 p.m. *Evening Reception [Le Salon]*

<h2 style="margin: 0;">Thursday, September 20</h2>
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- 7:30 a.m. – 3:00 p.m. Registration [La Salle Pre-function, 3rd Floor]
- 7:30 a.m. *Breakfast*
- 8:30 a.m. General Session [La Salle Ballroom A]
- 10:30 p.m. *Networking Break*
- 11:00 a.m. Breakout Session III
- Residential HVAC Committee [Poydras]
 - Commercial Kitchens and Connected Committees [Acadian I]
 - Motors and Motor Systems Committee: C&I Pumps Working Group II [Pelican I]
- 12:30 a.m. *Lunch*
- 1:30 p.m. Breakout Session IV
- Residential Water Heating Committee [Poydras]
 - Commercial Air-Conditioning and Heat Pumps Committee [Pelican II]
 - Compressed Air Committee [Pelican I]
 - Emerging Technologies Advisory Committee I [Algiers A, 2nd Floor]
- 3:00 p.m. *Networking Break*
- 3:30 p.m. Concurrent Session II
- Residential Committees: Integrated Homes II [La Salle Ballroom C]
 - Commercial and Industrial Committees: Strategic Energy Management and Connected Buildings II [La Salle Ballroom B]
 - Emerging Technologies Advisory Committee II [Algiers A, 2nd Floor]
- 5:00 p.m. *Industry Partners Meeting Adjournment*

<h2 style="margin: 0;">Friday, September 21</h2>
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- 7:30 a.m. – 12:00 p.m. Check-in [La Salle Pre-function, 3rd Floor]
- 7:30 a.m. *Breakfast*
- 8:30 a.m. Portfolio Advisory Committee [Poydras]

Tuesday,
September 18

Event
Descriptions

Tuesday, September 18, 2018

Day Ahead Events

SEM Workshop (Invite Only)

8:30 a.m.–4:30 p.m.

CEE member SEM programs have served more than 1100 industrial sites, and a growing number of commercial buildings. Together with leading SEM practitioners, the CEE SEM Committee is seeking to inform future SEM program design and delivery strategies and increase scale. During this full-day, invitation-only workshop, SEM program managers and third-party SEM practitioners will analyze previously collected SEM program experience, while seeking to identify customer traits that could reduce site-to-site customization, risk, and cost. Participants will work together to refine a set of organizational profiles for enterprises at which SEM has proven effective and replicable, and the critical program elements to serve them. Following the Workshop, the CEE SEM Committee will capture these outcomes in a resource to enhance the impact and scale of program investments in SEM.

The National WWII Museum Visit

1:00 p.m.–5:00 p.m.

When thinking of New Orleans, Mardi Gras, Bourbon Street, and Jazz often come to mind, but did you know that the second highest rated museum in the world (TripAdvisor 2017) is also located in the “Big Easy”? For those arriving early, we invite you to join CEE Staff, fellow members, and industry partners for an organized afternoon visit to [The National WWII Museum](#). The group will depart the lobby of the InterContinental Hotel on foot at 1:00 p.m. and will return in time for the CEE Welcome Hour.

Welcome Hour

5:30 p.m.–6:30 p.m.

Consortium members have appreciated the chance to meet and greet to get to know each other better before delving into the content of the CEE Industry Partners Meeting over the next two days. For attendees arriving on Tuesday, please join staff representing each CEE sector for Dutch-treat style refreshments on the 3rd floor of the InterContinental Hotel in the La Salle and Pelican Pre-function area. Please be aware that the bar is cash only.

Dinner

6:30 p.m.

Following the Welcome Hour, several CEE staff will be available to lead interested attendees to dinner at one of the many nearby restaurants.

Wednesday,
September 19

General
Session
Descriptions

- 8:30 a.m. Opening Remarks
Ed Wisniewski, Executive Director, CEE
- 8:45 a.m. Energy Efficiency Programs and Trends in Our Industry
Presenter: Kevin Bright, Managing Director – Creation & Connections, Duke Energy
By sharing the evolution of energy efficiency program funding, a perspective on the recent changes in priorities affords the audience insight into general program trends in the US and Canada. Specifically, the presenter will offer preliminary findings from the 2018 CEE Annual Industry Report, which measures efficiency program budgets, expenditures, and impacts. Using this dataset, which has been extensively cited by energy media, financial analysts, government agencies, energy management companies, and CEE members over the years, the presenter will highlight unique findings for gas and electric programs relevant for industry partners.
- 9:15 a.m. How Customers View Energy Efficiency—Recent Research Informing Program Strategy
Presenter: Sara Conzemius, Co-Founder, ILLUME Advising LLC; Colleen Hepner, Market Research Manager, ComEd
CEE members dedicate significant resources towards better understanding their customers in order to provide useful energy saving services, while also identifying new opportunities to deliver savings. During this session, a market research firm currently supporting multiple CEE members and a market research manager for a large Investor Owned Utility will provide relevant insights regarding the connected home, engaging small commercial customers, environmentalism as a market driver, and the intersection of consumer behavior with the smart grid. Attendees will be invited to share recent research conducted by their organizations, and to reflect on the implications of how efficiency program administrators and industry partners can better serve their shared customers.
- 9:45 a.m. CEE Short Takes
CEE staff will provide key updates coming out of member-driven committees, projects, and explorations, including the *Lighting for Tomorrow* competition, recently launched *CEE New Homes Initiative*, Home Appliances Committee, revisions to the *High Efficiency Air-Conditioning and Heat Pumps Initiative*, and the Commercial Lighting Committee.
- 10:00 a.m. *Networking Break*

Wednesday,
September 19

Concurrent
Session I
Descriptions

RESIDENTIAL COMMITTEES: INTEGRATED HOMES I

The Journey Continues: Forging a Path to the Integrated Home

Alice Rosenberg, Eileen Eaton, and Catie Dimas, CEE

Description CEE members believe that the Integrated Home offers key energy efficiency, load management, and consumer engagement opportunities. However, the road to fully achieving these is a long and bumpy one, with many challenges and complexities. CEE members are taking initial steps to help realize these benefits both now and in the future. As the adoption of residential communicating technologies continues to increase, there is also collective interest in supporting positive consumer experiences. In much the same way that CEE has worked with stakeholders to transform markets for energy efficiency performance historically, members see value from continued engagement and collaboration with industry partners in seeking IDSM benefits from the integrated home.

Objectives

- Provide necessary context about current and forward-looking CEE principles of connected and holistic integrated home efforts
- Supply valuable insights into emerging member and industry partnerships and identify opportunities for future collaboration

Agenda

Welcome, CEE Integrated Home Concept, and Work to Date

- Eileen Eaton and Alice Rosenberg, CEE

Member and Industry Panel on Partnerships in the Current Landscape

- Connected devices in today's market are not designed to seamlessly integrate with all connected devices in the home, provide actionable data to consumers, be controlled by an energy management system, or readily participate in demand response programs. These desired outcomes are being forged by partnerships between program administrators, manufacturers, and other providers.
 - Connected Room Air-conditioner Partnership – Kate Bogart, Think Eco Inc.
 - Connected Thermostat Partnership – Carlos Ruiz, Southern California Gas Company
 - Data and Energy Management Partnership – Courtney Thier, CURB

Group Discussion – Identifying Common Solutions

- Are there other significant or innovative partnerships that are worth highlighting for the group?
- What processes or lessons learned from these partnerships were the most compelling to you?
- Did you observe any trends or market gaps that are applicable to a large number of stakeholders and worth addressing collectively?

Continuing Our Discussions – Context for Residential Connected Sessions

- Eileen Eaton and Catie Dimas, CEE

Location

La Salle Ballroom C

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

This session is designed for in-person participation only; a conference call line will not be available.

COMMERCIAL AND INDUSTRIAL COMMITTEES

Strategic Energy Management and Connected Buildings

Ted Jones and Bjorn Jensen, CEE

Description Program administrators and industry partners are well positioned to bring highly efficient, interoperable, and interactive equipment that enhance building performance and provide greater visibility, control, and value to customers and the grid. Session attendees will discuss a common vision to bring energy efficient and connected buildings systems to market under C&I Strategic Energy Management (SEM). During the session, a C&I SEM platform will be presented that outlines the role and benefits of connected equipment and energy services within integrated commercial and industrial facilities. A panel of utility program administrators will describe how this vision relates to current and future demand side management (DSM) program offerings for C&I customers. The program panel will also comment on the technologies and services they assume will be available from the market to achieve program objectives, including the features and capabilities of efficient and interactive building systems. All participants will then discuss the value propositions driving investments in connected C&I technologies. The session will conclude with an overview of specific breakout session objectives and how they will contribute to C&I SEM.

Objectives

- Present a vision for C&I SEM that identifies drivers and value propositions for connected equipment in C&I facilities for customers and utilities
- Set context for meeting breakout sessions, including potential partnerships for exploration

Agenda

Welcome and Introductions

- Ted Jones, CEE

CEE Vision for a C&I SEM Platform

- Ted Jones, CEE

Program Administrator Panel: Connected Building Systems for SEM in Current and Future Programs

- Mark DiPetrillo, Manager, Technical Sales Support, National Grid
- Steven Warkentin, Portfolio Manager, Xcel Energy

Discussion

- What role do you see connected functionality playing in you market or product area? How do products or services that your companies offer (or are planning to offer compare) to the CEE vision and panelists assumptions? What challenges and opportunities do you see?

Wrap Up and Next Steps

Location

La Salle Ballroom B

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

This session is designed for in-person participation only; a conference call line will not be available.

Wednesday,
September 19

Breakout
Session I
Descriptions

RESIDENTIAL LIGHTING COMMITTEE

Breaking Down Connected Lighting Barriers

Eileen Eaton and Catie Dimas, CEE

Description CEE members have identified connected residential lighting as a key area of importance for achieving savings and delivering customer satisfaction. With the delta of energy efficiency savings diminishing, the future value of residential lighting stems largely from the ability to serve as a stepping-stone to the integrated home, which potentially offers greater consumer engagement and load management benefits overall.

Lighting remains high on the list of connected devices that customers are interested in purchasing, and therefore serves as an effective measure through which program administrators can engage customers. A top priority is ensuring a positive customer experience with connected lighting devices so that it continues to lead these users down an integrated home path. This session will explore what partnership opportunities exist for CEE members and residential industry stakeholders to ensure this productive experience, including how participants might collectively leverage the *Lighting for Tomorrow* platform.

Objectives

- Discuss potential partnership opportunities to deliver a positive collective consumer experience
- Assess how the existing *Lighting for Tomorrow* competition might be modified to meet this objective

Agenda

Welcome and Introductions

- Eileen Eaton, CEE

Recap of the *Lighting for Tomorrow* Connected Lighting Workshop

- CEE staff and workshop attendees

Review Connected Lighting Logic Model, Top Market Barriers, and 2019 Proposal

- Eileen Eaton, CEE

Group Reactions and Discussion of the “*Lighting & Homes for Tomorrow*” Concept

- Is a competition model the best way to address market barriers associated with connected lighting? Are there other activities that we should consider?
- Do you support expanding the scope of *Lighting for Tomorrow* to include other connected devices and systems in a home? Do you agree with the logic for this approach?
- What concerns or questions does a *Lighting & Homes for Tomorrow* competition raise?
- What critical elements would you like to see included in such a competition or other proposed efforts?

Wrap Up and Next Steps

- Eileen Eaton, CEE

Location

Acadian I & II

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.
Phone Number: 877-805-0965
Access Code: 4074395#

GAS COMMITTEE AND EMERGING TECHNOLOGIES COLLABORATIVE

Comfortable and Connected: The Future of Residential Gas Programs

George M. Chapman, CEE

Description Throughout the spring and summer, CEE members have met to discuss emerging gas savings opportunities and inform a priority roadmap for efficiency programs as they engage in multi-year planning exercises and develop future programs. Through these discussions, CEE members have identified gas heat pumps as a critical technology for achieving significant gas energy savings across multiple applications. During this session, CEE members and industry partners will assess two possible approaches for accelerating gas heat pump commercialization and market development. Participants will be asked to assess how these proposals may support their efforts to introduce mass market gas heat pump products and programs. The desired outcome is for participants to identify a viable and valuable pathway to work together to accelerate introduction and uptake of gas space and water heating systems achieving greater than 100% efficiency.

Objectives

- Establish gas heat pumps as a critical technology for natural gas energy efficiency, with specific emphasis on residential applications
- Assess and refine proposals for advancing the development, commercialization, and market adoption of gas heat pump technology through collaborative action at CEE

Agenda

Welcome and Introductions

- George M. Chapman and Kim Erickson, CEE

Background and Technology Roadmap

- Ryan Kerr, GTI

Proposals to Advance the Market for Gas Heat Pumps

- Kim Erickson and George M. Chapman, CEE

Discussion

- What are your primary objectives for supporting or advancing the market for gas heat pumps?
 - Do you envision priority applications for this technology?
- How do the proposed approaches support your objectives?
 - Are there ways these approaches could be modified to better enhance these potential benefits?
- How do the proposed approaches potentially hinder your objectives?
- Are there ways these approaches could be modified to mitigate these potential hindrances?

Location

Poydras

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.

Phone Number: 877-805-0965

Access Code: 6903572#

Webinar:

<http://cee.adobeconnect.com/gashps20180919/>

STRATEGIC ENERGY MANAGEMENT AND COMMERCIAL WHOLE BUILDING PERFORMANCE COMMITTEES

The Commercial SEM Customer: Applying Lessons Learned from Industrial SEM and Commercial Whole Building Programs

Ted Jones and Laura Thomas, CEE

Description Building on the extensive experience and learnings from over 1,100 industrial sites served, the Strategic Energy Management Committee has been building organizational and technical profiles of customers where SEM programs have proven to be effective and replicable. In addition, the Commercial Whole Building Performance Committee has compiled program profiles to understand program designs and customer factors that enable successful meter data driven program approaches. During this session, the two Committees will come together to share the outcomes of these efforts and how the learnings can inform commercial SEM programs. Additionally, participants will discuss next steps in advancing and proving the validity of the organizational profiles developed by the SEM Committee to support binational energy efficiency savings in both industrial and commercial facilities.

Objectives

- Apply lessons learned from industrial SEM and commercial whole building programs to inform commercial SEM program designs, including commercial customer segments and characteristics that indicate a facility is well-suited to participate in an SEM program
- Determine next steps in proving the validity of the organizational profiles

Agenda

Welcome and Introductions

- Ted Jones, CEE

Review and Outcomes of CEE Committee Work

- Ted Jones and Laura Thomas, CEE
 - CEE staff will provide an overview of the SEM and Commercial Whole Building Performance Committee work and learnings about customer factors in commercial and industrial facilities that have enabled successful energy management programs

Discussion of How Committee Learnings Apply to Commercial SEM

- Participants will review and determine if the customer and facility characteristics identified in industrial SEM implementations and commercial whole buildings are applicable in commercial SEM and what characteristics may be unique

Next Steps

- Discuss how the SEM Committee will continue to advance and test the validity of the organization profiles developed during the Workshop

Location

Pelican I

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.
Phone Number: 877-885-3221
Access Code: 5223910#

Wednesday,
September 19

Breakout
Session II
Descriptions

CONNECTED, RESIDENTIAL HVAC, AND RESIDENTIAL WATER HEATING COMMITTEES

Connecting Potential Value Streams to Real World Outcomes

Catie Dimas, CEE

Description Residential HVAC and water heating represent significant loads in the home, making them ideal candidates for delivering demand-side management, customer satisfaction, and grid benefits from onboard connected elements that are rooted in open-standard communication protocols. This session will focus on the various in-field performance opportunities of these systems and highlight how market-wide consistency of criteria and capabilities can help support the realization of benefits for these types of equipment and others. Participants will discuss market and program trends, consider how the voluntary uptake of consistent connected criteria (or program design) may achieve both local impact and broader industry shifts, identify grid and customer benefits, and outline next steps for any areas in need of further collective development.

Objectives

- Build shared understanding of the current field performance of connected residential HVAC and water heaters
- The session outcomes will inform imminent updates to the *CEE Residential HVAC Initiative* and help support deployment and adoption of the *CEE Residential Water Heating Initiative* connected criteria
- If applicable, participants will identify next steps for future industry engagement, program guidance, or other activities

Agenda

Welcome and Introductions; CEE Approach to IDSM

Field Performance and Lessons Learned

- Featured case study
 - Conrad Eustis, Portland General Electric
- Participants to provide examples and engage in an interactive forum

Discussion and Call to Action

- Do these systems offer complementary benefits in addition to kilowatt flexibility? Are the opportunities clearly documented, or are there additional studies required to demonstrate savings?
- What role might smart controls play in the overall strategy for IDSM benefits?
- Is there a way to collectively define performance, structure incentives, and increase effectiveness?
- What needs to happen next to scale up these technologies? What types of discussions still need to be had among respective stakeholder groups to enable market transformation?
- How does the customer journey progress from energy efficiency to added connected functionality? In what ways can program administrators and manufacturers support customer education and satisfaction?
- How can CEE end-use Initiatives be positioned to better meet demand response, field performance, customer engagement, diagnostics, interoperability, and other needs to realize the integrated home vision?

Wrap Up and Next Steps

Location

Pelican II

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.

Phone Number: 877-885-3221

Access Code: 4435056#

GAS COMMITTEE: STEAM SYSTEMS EXPLORATION

Full Steam Ahead: Working Towards a New Steam Assessment

George M. Chapman, CEE

Description CEE Exploration members and industry partners have had the opportunity to review and provide feedback for an initial steam system assessment that can identify savings opportunities at significantly reduced expense and effort than a full steam audit. The goal of this tool is to enable programs and industry partners to enhance current measure-based evaluations to include system considerations and lead to more projects and effective program delivery. During this session, CEE members and industry partners will come together to review additional comments and suggestions from this industry review period in order to refine and optimize the tool for program implementation. Considerations will include question sequencing and scope, necessary assessor competencies or tools, and format. Furthermore, attendees will identify opportunities to utilize this tool to deliver greater customer savings, and implementation strategies to encourage uptake of the screening tool and program approach.

Objectives

- Refine and revise the draft assessment based on industry partner feedback and consensus considerations
- Identify strategies for promoting and implementing the tool in the market

Agenda

Welcome and Introductions

- George M. Chapman, CEE

Background and Assessment Tool Description

- George M. Chapman, CEE

Discussion

- Is there additional information this tool should seek to collect?
- How applicable is the tool to different customer types? Should it be modified for customer types?
- Is this tool a practical extension of current industry approaches or offerings?
 - Do you feel that market actors would be able to incorporate this tool in current or revised offerings?
 - Would the requested information be available to a moderately trained individual? What type of customer support would be necessary to provide the required information?
- How would your program or company seek to use the information gathered through this tool?
 - Would this promote or support additional savings opportunities?
- How would you see utilizing this tool?
 - Are there other formats that would enable greater use or applicability of this tool?

Location

Poydras

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.

Phone Number: 877-805-0965

Access Code: 2299602#

MOTORS AND MOTOR SYSTEMS COMMITTEE: C&I PUMPS WORKING GROUP I

Pump up the Savings: Program Priorities for C&I Pump Upgrades

Walker Larsen, CEE

Description Pumps account for 27 percent of electricity used for industrial systems in US manufacturing and represent an estimated 38,000 GWh/yr energy savings opportunity nationwide. During this session, attendees and C&I Pumps Working Group members will discuss consensus efficiency program strategies to transform the market for C&I clean water pumps, emphasizing program priorities, definitions of performance that can be supported by program administrators, and data needs that can be met by industry partners. Following this discussion, pump industry partners will provide an update on their work to comply with DOE regulation, support program activity, and initial thoughts on meeting program administrator priorities. The information shared in this session will tee up outside discussions on specifics aspects of a program administrator strategy for pumps to inform the deliberative market strategy session taking place the following day.

Objectives

- Program administrators and industry partners understand each other's priorities, needs, and limitations with regards to support for pumping energy efficiency

Agenda

Welcome/Introductions

- Walker Larsen, CEE

Overview of Program Administrator Position

- Patrick Moore, PG&E, CEE C&I Pumps Working Group Co-chair

Industry Roundtable Response

- Industry partners will have an opportunity to ask clarifying questions and provide relevant industry updates and perspective in a roundtable format

Discussion

- Are the performance levels presented by the CEE C&I Pumps Working Group supportable by pump manufacturers that make products covered by the proposed specification?
- Does the way the Working Group defined product categories make sense for the pump market and for use as the basis for individual programs? Does it provide a specific enough signal while also allowing program implementation flexibility?
- Do industry efforts to support pump manufacturer compliance with the new DOE clean water pump rule add value to energy efficiency program efforts? How can these industry programs be leveraged to support a binational energy efficiency program administrator market strategy for pumps?

Location

Pelican I

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.

Phone Number: 877-885-3221

Access Code: 3041263#

COMMERCIAL LIGHTING AND WHOLE BUILDING PERFORMANCE COMMITTEES

Connecting the Pieces: Understanding the Integration between Lighting and Energy Management Systems

Ted Jones and Laura Thomas, CEE

Description In a working session at the CEE Summer Program Meeting, DSM program administrators identified advanced, integrated lighting systems as critical enablers of holistic energy and demand management. Energy savings and potential demand management from improved controls are two important features, but program administrators highlighted the capability to gather and communicate data such as occupancy and temperature that could be used to drive operational decisions as a key value of advanced lighting systems for DSM programs. This session will incorporate the lighting industry perspective on the role of integrated lighting systems in energy and demand management.

Objectives

- Share consensus DSM program priorities for integrated lighting systems that enable and enhance holistic energy and demand management
- Learn how the lighting industry views the role of connected lighting systems in the context of grid integrated buildings

Agenda

Welcome and Introductions

Commercial Lighting Program Landscape: Lamps, Network Lighting Controls, and Beyond

The Evolving Connected Lighting Market

- Felipe Leon, Pacific Northwest National Laboratory

Insight on Program Administrator Questions about Integrating Lighting Systems and EMIS

- Participants will discuss the questions that came out of the CEE Summer Program Meeting:
 - How are communications between end use systems, or between lighting building automation and control systems developing?
 - How is connectivity changing the role of lighting in the building environment?
 - What are the key value propositions of advanced lighting for various commercial segments, including small and medium business?

Next Steps

Location

Acadian I & II

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.
Phone Number: 877-885-3221
Access Code: 5223910#

Thursday,
September 20

General
Session
Descriptions

8:30 a.m. Welcome Back
John Taylor, Deputy Director, CEE

8:45 a.m. Gained in Translation: International Learning, Binational Behavior Program Benefits
Presenter: Beth Karlin, Founder and CEO, See Change Institute

This session will focus on CEE participation in the [International Energy Agency's DSM Task 24 behavior project](#). The project represents a unique opportunity to learn from behavioral program approaches and evaluation techniques that have been successful abroad to help design innovative and effective behavioral programs in the US and Canada. The 10 CEE members who have generously sponsored this project have selected the focal area of behavioral evaluation methods, credibility, and persistence to further examine during this year-long effort. Beth Karlin, an IEA project partner, will provide an overview of this strategic opportunity to leverage effective program approaches from abroad to enhance the credibility and persistence of behavioral savings at home.

9:30 a.m. Change is the Constant: Regulatory and Policy Changes Impacting Energy Efficiency Program Administration

Presenters: Rusty Tharp, Director of Regulatory Affairs, Goodman Manufacturing; Joshua Greene, Vice President Government and Industry Affairs, A.O. Smith

Every industry is going through "unprecedented change." Utilities, trade associations, software service providers, wholesale capacity markets, state energy offices and PUCs, and even federal government agencies, are experiencing the ground shift under their feet. Our presenters will focus on the regulatory and policy shifts occurring today at the state and federal levels that directly affect the HVAC and water heating markets, paying particular attention to implications on the sale of high efficiency products and services. Session participants will be invited to share the implications of these market observations for new energy efficiency program designs and to comment on similar dynamics in other markets.

10:30 a.m. *Networking Break*

Thursday,
September 20

Breakout
Session III
Descriptions

RESIDENTIAL HVAC COMMITTEE

Evolving Ratings for Evolving Systems: Mapping Out the Future of HVAC Equipment Metrics

Alice Rosenberg, CEE

Description As residential HVAC technologies evolve, they are increasingly complex and sophisticated in design. However, the current rating and certification metrics do not necessarily accurately represent the field performance of these advanced products. In this session, participants will evaluate current efforts across the United States and Canada that are exploring alternative methods for measuring the performance of central air-conditioners and heat pumps, including low-ambient performance air source heat pumps. As part of an envisioned roadmap for updated rating methods, the group will focus on how demand-side management programs can play an integral role in enabling the shift to more reflective metrics through the adoption of voluntary specifications to support future mandatory standards. Drawing on examples from other industries and past experiences, this session will apply a critical lens to tease out the next steps and stakeholders required to facilitate such transformative changes.

Objectives

- Evaluate where there is collective interest and need for new or modified approaches for measuring and rating the field performance of HVAC equipment, and define a scope for which product types to include in this prospective work
- Identify what role(s) the Consortium might play in determining how program administrators can help advance these goals in partnership with industry

Agenda

Welcome and Background

- Alice Rosenberg, CEE

Presentations and Panel Discussion

- National Efforts:
 - Chris Perry, ACEEE
 - Rosalyn Cochrane, Natural Resources Canada
- Utility Perspectives: Don Brundage, Southern Company, then open to others
- Manufacturer Perspectives: Rusty Tharp, Goodman Manufacturing, then open to others

Group Discussion and Deliberation

- Long-term Objectives – Is working towards new metrics and ratings a shared objective for participants? In looking forward at the 2023 Federal Rulemaking, are there central positions and objectives that the group agrees are important to ensure?
- Short-term Objectives – Which efforts are already in place, which ones would benefit from active collaborative work, which parties are best positioned to undertake these goals, and what timelines are critical to work within in order to ensure they happen and meet the identified long-term objectives?

Next Steps

Location
Poydras

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.
Phone Number: 877-805-0965
Access Code: 7186370#

COMMERCIAL KITCHENS AND CONNECTED COMMITTEES

Breaking the Ice: Envisioning a CEE Specification for Efficient Commercial Ice Machines

Laura Thomas and Catie Dimas, CEE

Description CEE members support high efficiency air- and water-cooled commercial ice machines through voluntary adoption of *CEE Commercial Kitchens Initiative* equipment performance specifications. As a result of recent market advances and rising federal minimum standards, the Consortium is considering revisions to the CEE Commercial Ice Machine Specification to better reflect energy efficiency improvements with this product type and the emergence of connected functionality.

To inform the proposed Specification revisions, participants will discuss how different customer segments (such as food sales and service, hotels, and health care) purchase and use automatic commercial ice makers, as well as product features that may be valuable for customers and the grid. This session will pave the way for program guidance relating to how customers purchase and operate these machines and help outline the potential benefits of connected ice maker capabilities.

Objectives

- Inform the key aspects of the proposed revision to the CEE Commercial Ice Machines Specification, including an Advanced Tier and optional connected criteria to continue to advance the demand-side management potential of commercial ice machines

Agenda

Welcome and Introductions

CEE Ice Machine Speciation History and Current Revision

How Market Segments Impact Sales and Connected Needs

- Program administrators have indicated that participation in commercial ice maker incentive programs varies between market segments; understanding the needs of various customer segments with these products will be considered in the development of Initiative resources.

Small Group Discussion

- Participants will break into small groups to share insights on specific market segments (food service, food sales, hospitality, health care), answering the following questions:
 - What characteristics define these customers?
 - What features are valued, or benefits sought by this customer from an ice maker?
 - How does this customer type purchase an ice maker?
 - What issues or concerns does this customer have about connected capabilities?
 - Are customers in this market segment frequent participants in energy efficiency programs?

Wrap Up and Next Steps

Location

Acadian I

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.
Phone Number: 877-885-3221
Access Code: 5223910#

MOTORS AND MOTOR SYSTEMS COMMITTEE: C&I PUMPS WORKING GROUP II

Crafting a Binational Program Strategy to Transform the Market for C&I Pumps

Walker Larsen, CEE

Description Clean water pumps are ubiquitous in commercial building HVAC systems and feature prominently in a range of sizes and configurations across commercial, industrial, and agricultural processes. Building off the prior breakout presentations and discussions, C&I Pumps Working Group members and invited industry partners will discuss specific program strategies to support pump upgrades, including complementary market transformation roles for both program administrators and industry stakeholders. The goal of this session is to achieve consensus on a program administrator market transformation strategy that industry can support and help to implement.

Objectives

- Program administrators and industry partners will agree on roles and mutually supportable strategies to transform the market for C&I pumps, which can be incorporated into a new CEE Initiative for pump systems

Agenda

Welcome and Introductions

- Walker Larsen, CEE

Discussion

- In addition to defining high performance products for the market, what role(s) can energy efficiency program administrators play to help advance pump energy performance?
- What information or resources can Hydraulic Institute and individual manufacturers provide to support energy efficiency program work?
- What complementary actions can industry partners take to advance pump energy performance?
- What distinct actions can program administrators and industry partners take with different supply chain stakeholders to advance supply chain and pump end user understanding of pump energy performance and how to incorporate energy performance into pump selection?
- What program and product information can and should be tracked as part of the binational program administrator strategy to measure program impact? What information should be reported to help inform ongoing market transformation activities?

Location

Pelican I

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.
Phone Number: 877-885-3221
Access Code: 3041263#

Thursday,
September 20

Breakout
Session IV
Descriptions

RESIDENTIAL WATER HEATING COMMITTEE

Chipping Away at Supply Channel Challenges

Alice Rosenberg and George Chapman, CEE

Description The new *CEE Residential Water Heating Initiative* was launched on March 16, 2018. In addition to product specifications for gas storage, gas tankless, and heat pump water heaters, it includes participation requirements focused on 1) engaging contractors and customers through education and training, and 2) reducing barriers or inefficiencies related to stocking, distribution, sale, and purchase of efficient products. In this session, the group will look at which approaches are working effectively in different programs and how they are achieving these results. Participants will unpack the components that lead to successful individual program design and delivery in order to distill strategies for driving greater binational market transformation. Elements for discussion include:

- Mechanisms to increase local availability of efficient equipment
- Support for midstream players to reduce cost barriers
- Engagement of new stakeholders to improve program deployment
- Tactics or techniques to influence decision moments

Objectives

- Analyze the array of program design models and parse out the components that potentially lead to more successful market uptake
- Refine successful practices for designing and deploying programs that achieve uptake of efficient water heaters
- Translate consensus findings into a draft program guidance resource that program administrators and industry partners can utilize for deploying effective programs and supporting increased adoption of efficient water heaters

Agenda

Welcome and Overview of Evolving Program Approaches

- Alice Rosenberg, CEE

Guided Group Discussion – Successful Design and Deployment Strategies

- Point of Sale Rebates at Retail
- Installer Education through the Distribution Channel
- Combined Downstream + Midstream Incentives

Development of Content for CEE Program Guide

- Takeaways regarding best practices for creating effective residential water heater programs that address persistent supply channel barriers, including prioritization of approaches that delivery greatest benefits. The group will work to refine outcomes from the three discussion topics (above) as well as other strategies that participants have found particularly effective in the market to date.

Location

Poydras

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.

Phone Number: 877-805-0965

Access Code: 7186370#

COMMERCIAL AIR-CONDITIONING AND HEAT PUMPS COMMITTEE

Helping Program Administrators Get Comfortable with VRF Systems

[Bjorn Jensen](#), CEE

Description Already widely used in Asia and Europe, variable refrigerant flow (VRF) systems are seeing over ten percent annual sales growth the US and Canada due to their efficiency, design flexibility, and ability to maintain comfort quietly. VRF multisplit air-conditioning and heat pump systems were added to the scope of the *CEE High Efficiency Commercial Air-conditioning and Heat Pumps Initiative* in 2012. In light of recent market changes, including more stringent performance requirements in ASHRAE 90.1-2016 and the ENERGY STAR® Light Commercial HVAC Specification, the CEE Commercial Air Conditioning Committee is considering revisions to the CEE Specification. The Committee has determined that a common performance specification alone will not enable mass market program support due to difficulty effectively translating VRF performance ratings and manufacturer provided performance data to infield operation. CEE members also report that problems with VRF system design, installation, and operation are not uncommon. In this session, participants will explore specific opportunities for program administrators and industry partners to address these issues together.

Location

Pelican II

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.
Phone Number: 877-805-0965
Access Code: 3653670#

Objectives

- Enhance understanding of stakeholder efforts to provide more comprehensive performance data
- Identify the building and climate characteristics of the best and worst opportunities for VRF
- Identify roles that CEE can play that would enable expanded program support for VRF

Agenda

Introductions and Session Overview

- Bjorn Jensen, CEE

Program Administrator Roundtable

- What is the potential value of supporting VRF systems in your program?
- How does your program currently support VRF systems?
- How would further defining good applications for VRF enable greater program support?
- Describe the system design and operational issues you've encountered. How do you see the need for vendor neutral design guidance? How would such guidance enable greater program support?

Group Discussion

- What are the characteristics of the best applications for VRF systems? What represents the best opportunity?
- What are the building or climate characteristics that define poor applications for VRF? Where does VRF make the least sense?
- What exists in terms of vendor neutral design, installation, and commissioning guidance? What certifications or qualifications indicate a contractor is well qualified to install and commission VRF systems?

COMPRESSED AIR COMMITTEE

A Better First Look: Exploring the Benefits of Standard Compressed Air System Screening Criteria

Walker Larsen, CEE

Description Compressed air systems represent a major energy end use in the commercial and industrial sectors, consuming 91 TWh of electricity in the United States annually and representing 16 percent of motor-driven systems energy use in US manufacturing facilities. Compressed air systems are generally unique, requiring the collection and analysis of specific design and performance information before energy efficiency opportunities can be identified. Program administrators participating in the *CEE Compressed Air System Initiative* see value in defining a common screening audit to help program administrators, trade allies, and customers identify and address energy efficiency opportunities, such as immediate measures, comprehensive system assessments, and facility staff training.

In this session, program administrators and industry partners will discuss the practical implications of specifying a set of best screening audit practices at the binational level, determine roles for development, and discuss how program strategies can complement industry efforts such as audit certification and training activities.

Objectives

- Program administrators will understand how industry partners, including manufacturers, distributors, and audit service providers can support a program administrator specification for a screening system audit
- Industry partners will have a clear understanding of the direction and priorities for the CEE Initiative strategy and will be able to incorporate relevant information into industry training opportunities

Agenda

Welcome, Introductions, and Committee Overview

- Walker Larsen, CEE

Industry Use of Screening Audits

- Mike Morin, Atlas Copco Compressors

Roundtable Discussion

- What value do program administrators see in defining a common set of screening level data to collect at the start of potential compressed air system projects?
- Do industry partners see value in program administrators adopting common project screening questions?
- Would a program administrator defined screening audit fit with existing compressed air project channels, both in terms of the type of service vendors can provide and how energy efficiency programs currently operate? Would a screening audit help advance the level of practice?
- How can program administrators and the compressed air industry collaborate to make it easier for customers to improve the energy efficiency of their compressed air systems?

Location

Pelican I

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

For members unable to travel to the meeting, a conference call line will be provided.

Phone Number: 877-885-3221

Access Code: 3041263#



Thursday, September 20, 2018
1:30–3:00 p.m., Central

EMERGING TECHNOLOGIES
COLLABORATIVE
Advisory Committee Meeting I
[Kim Erickson](#), CEE

Description This meeting is open to Emerging Technologies Collaborative (ETC) Advisory Committee members and their designees only.

Advisors who have not already received detailed meeting information should contact Kim Erickson (kerickson@cee1.org).

CEE members who are interested in learning more about sponsoring the ETC should contact Kim Erickson (kerickson@cee1.org).

Location
Algiers C [2nd Floor]

- Informative
- Deliberative

Who Should Attend
ETC Advisory Committee
Members or their designees only

Call-In Information
For ETC Advisory Committee members unable to travel to the meeting, a conference call line and webinar will be provided. Contact Kim Erickson (kerickson@cee1.org) for details.

Thursday,
September 20

Concurrent
Session II
Descriptions

RESIDENTIAL COMMITTEES: INTEGRATED HOMES II

The Journey Continues: Forging a Path to the Integrated Home

Alice Rosenberg and Catie Dimas, CEE

Description CEE members believe that the integrated home offers key energy efficiency, load management, and consumer engagement opportunities. However, the road to fully achieving these is a long and bumpy one, with many challenges and complexities. CEE members are taking initial steps to help realize these benefits both now and in the future. As the adoption of residential communicating technologies continues to increase, there is also collective interest in supporting positive consumer experiences. In much the same way that CEE has worked with stakeholders to transform markets for energy efficiency performance historically, members see value from continued engagement and collaboration with industry partners in seeking IDSM benefits from the integrated home.

Objectives

- Provide necessary context about current and forward-looking CEE principles of connected and holistic integrated home efforts
- Supply valuable insights into emerging member and industry partnerships and identify opportunities for future collaboration

Agenda

Current Venues for Collaboration and Industry Engagement

- Landscape of CEE committee work, supplemental projects, working groups, one-on-one industry engagement, and coordinated external efforts

Full Group Discussion – Identifying Opportunities for Cross-Industry Advancement

- Has the meeting prompted ideas for how different stakeholders across discreet work areas could work together and how CEE might be able to support these efforts throughout the year? Is there anything specific you would like to see replicated with a specific industry or regarding a specific topic?

Small Group Discussion – Brainstorming and Prioritizing the Next Chapters

- Based on conversations and breakouts over the past two days, are there particular types of partnerships that would benefit from greater coordination? These could be complementary products (e.g., HVAC and lighting), supporting services (e.g., energy data usage and real estate listings), joint marketing approaches (e.g., comfort through automation), or other strategies for shared objectives.
- **Each group will work through these potential “pairings”** and outline how such partnerships could evolve. Participants will define the opportunities, as well as challenges, and identify key steps necessary to advance the objectives. This includes infrastructural capabilities, regulatory or political context, involved stakeholders, technological needs, and process requirements. In addition, the group will work to identify potential responsible parties and a prospective CEE role.

2018 CEE Industry Partners Meeting Recap and Next Steps

- Opportunity for sharing of takeaways and attendee networking

Location

La Salle Ballroom C

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

This session is designed for in-person participation only; a conference call line will not be available

COMMERCIAL AND INDUSTRIAL COMMITTEES Industry Partners Meeting Action Items and Next Engagements

[Bjorn Jensen and Ted Jones](#), CEE

Description As commercial and industrial equipment becomes increasingly integrated and interactive, the topics and discussion outcomes achieved over the past two days will have greater relevance across industries and CEE Committees. This closing concurrent session will provide an opportunity for all C&I industry partners and CEE members to hear from one another about the important takeaways, next steps in CEE Committee work, and upcoming opportunities for industry partner engagement across CEE’s commercial and industrial portfolio. The session will use a small group discussion format to encourage creative thinking and discussion regarding utility-industry partnerships, shared objectives and opportunities, and new roles for binational DSM program collaboration. A closing report-out will ensure that all participants can benefit from the action items and upcoming chances to engage with CEE work that were discussed in working sessions over the past two days.

Objectives

- Highlight novel utility-industry partnership opportunities and new roles for binational DSM collaboration
- Recap key outcomes and next steps in CEE C&I Committees

Agenda

Welcome and Session Overview

- Summary of CEE Vision for Strategic Energy Management and Connected C&I Buildings and day 1 concurrent session outcomes
 - Ted Jones, CEE
- C&I Breakout Sessions Super Short Takes, CEE staff committee co-chairs

Small Group Discussion

- Attendees will be divided into small groups to discuss their takeaways from the past two days regarding:
 - Novel partnership opportunities and shared objectives
 - New roles for binational DSM collaboration
 - Most significant takeaway or lesson learned

Small Group Report-Out

- CEE staff will summarize the key points raised during their small group discussion.

Wrap Up and Next Steps

- C&I committee co-chairs will summarize the outcomes and next steps from the breakout session they led and reflect on insights from this session that may be addressed by committee work in the coming year

Location

La Salle Ballroom B

- Informative
- Deliberative

Who Should Attend

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

Call-In Information

This session is designed for in-person participation only; a conference call line will not be available

“Who Should Attend” Descriptions

Program Design and Planning

Responsible for developing and proposing programs including specification levels, evaluating cost-effectiveness, establishing rebate amounts, and deciding which activities the program will encompass (e.g. stakeholder education)

Program Management

Oversees the delivery of programs and can provide insights for the CEE process regarding what has worked and what has not

Marketing and Outreach

Promotes programs to the public and trade allies and makes decisions regarding promotional materials, advertising placements, and conducting on-line promotions

Evaluation or Market Research

Plans and oversees: market research for program planning or baseline setting, tracking and assessment of program impacts, progress towards program goals, and/or process evaluation. May also collect and analyze data in support of these efforts.

Regulatory Affairs

Responsible for working with regulators on rate cases

Technology and Engineering

Qualified to evaluate the technical potential, performance, or safety of equipment under consideration for inclusion in programs

Portfolio Management

Responsible for assessing efficiency program objectives, timelines, and resources (for a sector or the total portfolio), planning a set of sector programs needed to meet requirements beyond the current program year, and maintaining a balance of sector program activities across the portfolio in order to achieve multi-year goals, among other responsibilities

Government

Has government perspective of working toward energy efficiency goals

As a business confidential record of the Consortium’s activities, this Meeting Book is not to be distributed outside the current CEE Membership and invited guests.

Supplemental Information

Nearest Pharmacy

CVS Pharmacy
800 Canal St, New Orleans, LA 70112
(504) 528-7099
Store Hours: Open 24 hours

Nearest Hospital and Emergency Room

[Tulane Medical Center](#)
1415 Tulane Ave, New Orleans, LA 70112
(504) 988-5263

Nearby Restaurants and Entertainment

Please use [this link](#) to see an interactive map containing restaurants and bars.

