### 16th Annual Industry Partners Meeting

**Tuesday, October 1 Events**

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<th>Time</th>
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| 8:30 a.m. | **General Session**  
Welcome and Keynote  
Ed Wisniewski, Executive Director, CEE |
| From Past to Present: Energy Efficiency Programs and Industry Trends  
John Boladian, DTE Energy |
| How a Shared IDSM Framework Manifests in Different ISO Regions  
Member Panel |
| 10:30 a.m. | Networking Break |
| 11:00 a.m. | **Breakout Session I**  
- Residential HVAC Committee II  
- Commercial Whole Building Performance Committee  
- Behavior Committee  
- *Portfolio Advisory Committee I* (Invitation Only) |
| 12:30 p.m. | Lunch |
| 1:30 p.m. | **Breakout Session II**  
- Residential HVAC Committee III  
- Strategic Energy Management Committee I  
- *Portfolio Advisory Committee II* (Invitation Only) |
| 3:00 p.m. | Networking Break |
| 3:30 p.m. | **Breakout Session III**  
- Commercial Air Conditioning and Heat Pumps Committee  
- Strategic Energy Management Committee II  
- Residential Water Heating Committee |
| 5:30 p.m. | Reception |

### Wednesday, October 2, 2019

**General Session**

### Thursday, October 3, 2019

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| 8:30 a.m. | **General Session**  
Welcome Back  
John Taylor, Deputy Director, CEE |
| Dynamic Times for our Industry Partners: What’s Changing for Critical Allies?  
Industry Panel |
| CEE Short Takes  
CEE Staff |
| 10:30 a.m. | Networking Break |
| 11:00 a.m. | **Breakout Session IV**  
- Motors and Motor Systems Committee: C&I Pumps Working Group I  
- Commercial Lighting Systems Committee  
- Crosscutting Connected Subcommittees |
| 12:30 p.m. | Lunch |
| 1:30 p.m. | **Breakout Session V**  
- Motors and Motor Systems Committee: C&I Pumps Working Group II  
- Residential Committees: The Integrated Home I  
- Emerging Technologies Collaborative |
| 3:00 p.m. | Networking Break |
| 3:30 p.m. | **Breakout Session VI**  
- Residential Committees: The Integrated Home II  
- Commercial Water Heating Committee |
| 5:00 p.m. | *Industry Partners Meeting Adjournment* |

For descriptions of these sessions, please see the [Detailed Agenda](#).

To register for the meeting, please visit the [16th Annual Industry Partners Meeting homepage](#).

July 2019 Version
Welcome and Introductions
Ed Wisniewski, Executive Director, CEE

From Past to Present: Energy Efficiency Programs and Industry Trends
Presenter: John Boladian, Director - Energy Efficiency, DTE Energy
During this session, the Chair of the CEE Board of Directors will offer preliminary findings from the 2019 CEE Annual Industry Report, which measures efficiency program budgets, expenditures, and impacts offering insight into general program trends in the US and Canada. Using this dataset, which over the years has been extensively cited by energy media, financial analysts, government agencies, energy management companies, and CEE members, the presenter will highlight unique findings for gas and electric programs relevant for industry partners. Understanding is further enhanced by the complementary CEE Program Performance Benchmarking framework and dataset comprised of key performance metrics yielding a reliable empirical basis to drive introspection and improve program impact and design.

How a Shared IDSM Framework Manifests in Different ISO Regions
While continuing to deliver customer energy and bill savings, CEE members continue to evolve their portfolio of voluntary customer programs to serve new objectives. Grid balancing, load forecasting and resource planning, load management, incorporation of behind-the-meter generation, and decarbonization are examples of how programs are expanding their purpose. How does this influence the technologies and functionality that will be promoted in the next generation of “energy efficiency” programs? What role will connected, automated products play? What new business opportunities will be enabled? During this session, utility leaders representing several different ISO regions will present the shared IDSM framework developed at CEE and describe applications and implications of this shared vision in their local service territories. Industry attendees will be encouraged to share observations about how their new products could be called upon by customers to capitalize on these opportunities and to identify discussion topics to address during the afternoon breakouts.

Networking Break
10:30 a.m. - 11:00 a.m.
CEE Initiative Revision: Natural Gas and Electric Equipment Specifications – The Brass Tacks (Part II of III)

**Description** Central to the revision of the CEE Residential Heating and Cooling Systems Initiative is developing consensus-driven specifications for differentiating high-performing equipment. In order to reflect current and future program opportunities for achieving energy savings, members are proposing a comprehensive suite of product specifications that complement a broader initiative strategy with the goal of emphasizing custom recommendations for individual retrofit scenarios. Draft specifications for discussion and review during this session include:

- Central air conditioners (split and packaged)
- Air source heat pumps (split and packaged), with further differentiation for specific application types that address regional considerations
- Natural gas boilers
- Natural gas furnaces
- ECM / furnace fans
- Low load furnaces
- Gas heat pumps

**Target Outcome** Members and industry partners will work to finalize specification design and performance levels for natural gas and electric equipment to be included in the revised CEE Residential Heating and Cooling Systems Initiative. This includes central air conditioners, air source heat pumps (including climate-specific considerations), natural gas boilers, furnaces, fans, low load furnaces, and gas heat pumps. Once finalized, the full initiative will be brought to the CEE Board of Directors for authorization and publication.

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COMMERCIAL WHOLE BUILDING PERFORMANCE COMMITTEE

**Defining the Capabilities of Energy Management Information Systems for Program Use**

**Description** Whole building energy efficiency programs are actively considering the program benefits of energy management information systems (EMIS) as part of their exploration into the contributions of whole building energy management to program and customer values supported by IDSM. These commercial building analytics technologies can be used to identify building and system issues as part of an energy efficiency program and have been shown to contribute to energy savings. However, the results of EMIS installations often vary in performance. To explore potential pathways to address the inconsistent results, the Committee is helping to support an EMIS field validation protocol project with Lawrence Berkley National Lab to define EMIS, quantify the benefits of EMIS tools to help customers reduce energy use and manage their

- Informative
- Deliberative

**Who Should Attend**

- Program Designing & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government
energy strategically, and demonstrate how EMIS can provide value to a C&I energy management portfolio.

**Target Outcome** Attendees will discuss project findings and the potential value EMIS can provide to programs. Industry partners, including energy management service providers and manufacturers of end use equipment like lighting and HVAC systems, will learn about the priorities of the CEE Whole Building Performance Committee and have the opportunity to help inform the future work towards advancing the role of EMIS in achieving deeper savings in commercial buildings.

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**BEHAVIOR COMMITTEE**

**Bridging the Gap: Using a Behavioral Lens to Engage Hard to Reach Customers**

**Description** Both manufacturers and program administrators strive to encourage the adoption of efficient technologies and practices, yet certain audience segments remain elusive. This category of customers (or potential customers) is often referred to as “Hard to Reach” (HTR), and can include, for instance, low income or rural customers on the residential side and small businesses on the commercial side. In this crosscutting session, attendees will have the opportunity to share who their organization identifies as HTR customers and how they have aimed to more effectively engage them. Participants will also consider how behavioral social science techniques might be leveraged to help better engage these segments. During this session, attendees will identify commonalities across industry partners’ and program administrators’ respective HTR audiences and consider future collaboration opportunities to more effectively engage these shared HTR audiences.

- [ ] Informative
- [x] Deliberative

**Who Should Attend**
- [x] Program Designing & Planning
- [x] Program Management
- [x] Marketing & Outreach
- [x] Evaluation or Market Research
- [x] Regulatory Affairs
- [x] Technology & Engineering
- [x] Portfolio Management
- [x] Government

**Target Outcome** Attendees will identify high priority HTR audiences and consider opportunities for industry partners and program administrators to collaborate in efforts to more effectively engage these customers.

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**Lunch**

12:30 p.m. – 1:30 p.m.
16th Annual Industry Partners Meeting

Breakout Session II       Wednesday, October 2       1:30 p.m. – 3:00 p.m.

RESIDENTIAL HVAC COMMITTEE III - CONNECTED

**CEE Initiative Revision: The HVAC Connected Conversation (Part III of III)**

**Description** CEE is working to revise its longstanding *Residential Heating and Cooling Systems Initiative*. As part of this effort, CEE will facilitate discussion between members and industry partners on draft optional connected criteria within the updated Initiative for where and how to include communicating requirements that enable efficiency gains, demand response opportunities, on-board diagnostics, in-field performance verification, behavioral change, and quality installation and maintenance. Applications for connectivity include thermostats, controls, electric equipment, and natural gas equipment.

**Target Outcome** Members and industry partners will review and revise a draft specification for optional heating and cooling system connected capabilities, including demand response of variable capacity through AHRI Standard 1380, control configurations able to deliver energy savings, customized solutions for specific applications, and performance-based approaches that enable energy management opportunities. Once finalized, the full Initiative will be brought to the CEE Board of Directors for authorization and publication.

STRATEGIC ENERGY MANAGEMENT COMMITTEE I

**Leveraging the CEE SEM Minimum Elements**

**Description** The *CEE SEM Minimum Elements* define Strategic Energy Management (SEM) in the market and the *CEE SEM Program Summary* describes how program administrators implement programs using the Minimum Elements. As program administrators and their customers gain experience with SEM, there is an opportunity to use data to explore which program aspects work well with specific customer types and consider how to elevate energy management practices within SEM programs beyond the minimum over time.

**Target Outcome** Program administrators will use data from the CEE SEM Program Summary to demonstrate how the CEE SEM Minimum Elements provide programs with the flexibility to serve a variety of customer types in different ways.

**Networking Break**

3:00 p.m. – 3:30 p.m.
### Breakout Session III

**Wednesday, October 2 3:30 p.m. - 5:00 p.m.**

**COMMERCIAL AIR CONDITIONING AND HEAT PUMPS COMMITTEE**

**Fit for Purpose: Supporting Well-Designed, Efficient VRF Systems**

**Description**
CEE is exploring potential enhancements to the CEE High Efficiency Commercial Air Conditioning and Heat Pumps Initiative to encourage appropriately designed, applied, installed, and commissioned efficient variable refrigerant flow (VRF) multisplit heat pump systems. Difficulty effectively translating VRF performance ratings and manufacturer-provided performance data to actual installed operation, and identifying the appropriate baseline alternative for energy savings estimation hinder the development of standardized, mass-market program offerings for VRF. Ensuring effective system design and operation in cold climates is another challenge.

This session presents an opportunity for industry partners to discuss potential initiative components, such as specified functionality or additional performance criteria, and program strategies that would increase the likelihood of achieving customer benefit and enable more standardized program offerings for greater scale. With this input from industry, program administrators can revise the CEE VRF Specification and the associated Initiative strategy to increase program support and market impact.

**Target Outcome**
Participants will identify strategies to promote appropriately designed, applied, installed, and commissioned VRF systems that advance efficiency, explore enhancements to the certified directories of VRF systems meeting the CEE Initiative requirements, and address the need for more comprehensive VRF performance data.

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**STRATEGIC ENERGY MANAGEMENT COMMITTEE II**

**Assessing the Spectrum of Energy Management Program Designs**

**Description**
Strategic Energy Management programs require high customer commitment to continuously improve their energy management over time, along with other criteria defined by the CEE SEM Minimum Elements. However, customers may wish to strategically manage their energy without such commitment, and program administrators may offer non-SEM programs and measures designed to meet this customer need along with their SEM program offerings. During this session, program administrators and energy services providers will discuss the spectrum of customer energy management needs and opportunities to align program design and delivery models with customers’ ability to manage their energy. What options exist for customers who cannot commit to Strategic Energy Management, such as programs that support lighting sensors and other equipment with automated energy management features? Is there an opportunity, or even an interest, in end-use equipment and whole building program designs providing a pathway for customers to participate in SEM programs?

**Target Outcome**
Industry partners will describe in-field experience with customer needs for energy management services and program solutions to inform program administrator consideration of C&I energy management programs, including but not limited to SEM.
RESIDENTIAL WATER HEATING COMMITTEE - ELECTRIC, NATURAL GAS, CONNECTED

Guidance is Golden: Codifying Elements of Water Heating Programs that Support the Delivery of Market Transformation Objectives

**Description** Residential water heating programs continue to evolve and employ new strategies for market intervention despite persistent barriers to adoption. This session will focus on transferrable approaches for driving uptake at scale for heat pump water heaters, high-performing natural gas storage and tankless units, and connected offerings that meet demand response and energy management objectives.

CEE will share a version of the draft Residential Water Heating Program Guide for review and comment. Opportunities for consensus positions include a breakdown of purchasing scenarios, points of intervention, program approach types, and other variables for consideration. The group will assess which features and attributes are uniformly effective in delivering adoption of high-performing water heaters through program design.

**Target Outcome** Participants will provide input and feedback on guidance recommendations that CEE staff will translate into a finalized Residential Water Heating Program Guide for publication. Consensus positions will also be used to inform the building blocks for a future CEE Residential Water Heating Initiative revision.
**Evening Reception**  
5:30 p.m. - 6:30 p.m.
Relax with friends new and old after the exciting day of efficiency-focused collaboration with complimentary hors d'oeuvres and refreshments.

**Dinner**  
6:30 p.m.
Following the Reception, several CEE staff will be available to lead interested attendees to dinner at one of the many nearby world-class restaurants.
Dynamic Times for our Industry Partners: What’s Changing for Critical Allies?

The utility industry is not the only sector undergoing unprecedented change. In some cases (IoT, climate change, and digitization) the underlying source of change is the same, while others are unique to a given industry. During this session, invited representatives from the HVACR, Lighting, Hydraulics, and ESCO industries will sketch out a snapshot of their current industry dynamics, homing in on issues relevant to CEE members administering voluntary programs. Understanding some of the focal points of these industries will inform current collaborations and perhaps identify new opportunities. Other industry attendees will be encouraged to share similar disruptions affecting their business operations and CEE members will have an opportunity to posit new program models that reflect the business realities presented.

CEE Short Takes

CEE staff will provide key updates coming out of member-driven committees, projects, and explorations. Come hear about all the great work members are doing through the Consortium and new partnership opportunities for our industry partners.

Networking Break

10:30 a.m. – 11:00 a.m.
Launching a New Market Strategy: Pump Systems Initiative Voluntary Specification and Strategies

Description The CEE Commercial and Industrial (C&I) Pumps Working Group will be finalizing a new CEE Initiative for C&I Pump Systems, including a voluntary product specification for clean water pumps and strategies to increase customer demand for and access to the best performing products for a given application. Strategies include educating the pump supply chain about new energy performance metrics, in part through support for the defined voluntary energy performance specification. At the Industry Partners Meeting, program administrators and industry will discuss industry comments on the draft Initiative and roles to best promote the identified market strategies.

Target Outcome Participants will ensure clarity and understanding of the scope and goals of the CEE Pump Systems Initiative, identify and respond to comments and concerns from industry, and clarify the voluntary performance specification, PEI, and ER metrics.

Understanding the Role of Advanced Lighting Systems in Energy Management Programs

Description CEE members are investigating the emerging value propositions of advanced connected lighting systems and their role in energy management approaches that support customer and program administrator consideration of the time and locational value of energy for enhanced customer and grid benefit. Four aspects of connected lighting systems for which energy program administrators are exploring the potential to advance IDSM objectives are: energy monitoring and analytics, external system integration, demand response and load management capabilities, and nonenergy benefits such as improved productivity, indoor air quality (IAQ), safety, and security. In this session, lighting industry partners will share their perspectives on emerging connected lighting system capabilities valued by customers and insight on emerging capabilities relevant to energy management. Together, industry partners and CEE members will hone connected lighting IDSM use cases that support shared program administrator and industry partner objectives and discuss how to advance items of common value more effectively, including the role of standards development.

Target Outcome Participants will help to refine the connected lighting IDSM use cases that enhance energy management and customer engagement approaches and will identify opportunities to collaborate to advance items of common value more effectively, such as through defining and establishing desired performance metrics, capabilities, or consensus guidance for incorporation into the CEE Commercial Lighting Initiative.
CROSSCUTTING CONNECTED SUBCOMMITTEES

Interoperability: Dissecting the Why, How, and What it Means for the Energy Industry

**Description** Interoperability is a key aspect of IDSM initiatives across all sectors and within the evolving CEE Integrated Home platform. Interoperability with multiple products and manufacturers is desirable to CEE members as it enables customers to retain flexibility for future choice of investment across devices and service providers. This session will provide a forum for attendees to take a critical look at how existing standards and protocols have evolved in the market to date and the implications for various actors throughout the channel of demand side players. Participants will engage in a dialogue with a panel of organizations leading the way in grid interoperability on the key components to IDSM initiatives, the role of standardization, and how this all comes together for each stakeholder.

**Target Outcome** Provide members and industry partners a better understanding of interoperability, how it affects the industry, and how each stakeholder in connected systems interact with each other. The group will discuss how specific protocols and collective efforts to date may help inform future industry efforts across the CEE Integrated Home platform.

- Informative
- Deliberative

**Who Should Attend**
- Program Design & Planning
- Program Management
- Marketing & Outreach
- Evaluation or Market Research
- Regulatory Affairs
- Technology & Engineering
- Portfolio Management
- Government

**Relevant Industries**
- HVAC
- Water Heating
- Lighting
- Products
- Integrated Homes
- Whole Buildings

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**Lunch**

12:30 p.m. – 1:30 p.m.
16th Annual Industry Partners Meeting

Breakout Session V  Thursday, October 3  1:30 p.m. – 3:00 p.m.

MOTORS AND MOTOR SYSTEMS COMMITTEE: C&I PUMPS EXPLORATION II

What’s Next: Future Considerations for Pump Energy Performance and Emerging Technology

**Description** The CEE Commercial and Industrial (C&I) Pumps Working Group will be finalizing a new CEE Initiative for C&I pump systems, including a voluntary product specification for five types of clean water pumps, not including circulator pumps. CEE is exploring additional program opportunities for circulator pumps and smart controls based on in-process DOE rulemaking and industry efforts to align the DOE work with existing metrics. This session presents an opportunity for industry partners to discuss potential program components and program strategies that would increase the likelihood of achieving greater savings and customer benefit cost effectively at scale.

**Target Outcome** Participants will assess ASRAC working group term sheets that establish scope, test, and metrics for circulator pumps, identify program opportunities for circulator pumps and smart controls, and identify potential additional program and customer benefits from pumps and pump systems as part of integrated building management.

CROSSCUTTING EMERGING OPPORTUNITIES

ET Pitch Session: What Matters

**Description** CEE member program administrators, manufacturers, and technology developers are regularly pitched by and to each other on the “next big thing” to invest in to advance common goals. These pitches sometimes resonate...and sometimes they don’t. This session aims to increase understanding of the criteria and considerations that energy program administrators and industry organizations think about when weighing whether to invest in a given emerging opportunity. Following a series of interactive “pitches” intended to illustrate what different audiences consider, participants will brainstorm potential approaches for energy programs to more effectively and consistently communicate what is important to program administrators when assessing emerging technologies.

**Target Outcome** Participants will have a greater understanding of the criteria program administrators, manufacturers, and technology developers consider when assessing emerging technology investments.
THE INTEGRATED HOME I

Defining Value: Characterizing the Layers of Significance that Connectivity Offers Utilities

Description CEE members have been working to achieve consensus around the different value streams that connected capabilities can provide to program administrators across the US and Canada. CEE will share and engage on the key value streams identified by residential program managers and provide insights into how their relative significance supports a broader CEE Integrated Home platform. Attendees will have the opportunity to learn and discuss how and why these priorities vary by geography, as well as what prospective evolutions might impact their relative importance in the future. The session will also provide a glimpse into current and planned residential program efforts and investments to support and realize the highest value utility benefits provided by connectivity. Participants are encouraged to assess and use these insights to inform the design of programs, products, and services with the objective of better leveraging planned investments and delivering these value streams.

Target Outcome Participants will discuss and come away with a greater understanding of how residential programs are characterizing, prioritizing, and investing in the different value streams associated with connected capabilities both now and as objectives evolve in the future so that the connected offerings they develop will obtain greater support by utilities and overall success in the market.

Networking Break 3:00 p.m. - 3:30 p.m.
THE INTEGRATED HOME II

**Delivering Value: Judging the Features of Connected Home Products, Systems, and Platforms**

**Description** To support the CEE Integrated Home vision and the associated value streams, CEE work hinges on collaboration and communication with industry stakeholders central to this dynamic market. Most recently, CEE has been working in partnership with a variety of constituents to develop a competition platform for connected home offerings – *Lighting & Homes for Tomorrow*. The Lighting & Homes for Tomorrow Steering Committee has developed robust evaluation criteria to assess the ability of connected entries to yield IDSM program benefits and deliver a positive consumer experience. During this session, participants will hear how the current evaluation criteria is designed to value connected capabilities and features and provide input on how this criteria could evolve in the future to deliver on the shared value streams identified in the first Integrated Home session.

**Target Outcome** Participants will discuss the critical elements in the *Lighting & Homes for Tomorrow* evaluation criteria as a concrete way to increase understanding of the goals and objectives that program administrators share relative to an Integrated Home platform. Industry partners will share current challenges and potential solutions to meeting these goals and objectives and provide feedback on how the *Lighting & Homes for Tomorrow* evaluation criteria or other connected requirements should evolve over time to better support the development of connected homes products, systems, and services that yield IDSM benefits and deliver a desirable consumer experience.

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

**Relevant Industries**
- Appliances
- HVAC
- Integrated Homes
- Lighting
- Water Heating

COMMERCIAL WATER HEATING COMMITTEE

**Thinking Beyond the Tank: Optimizing Commercial Water Heating Efficiency Through System Approaches**

**Description** CEE members have recently proposed expanding the [CEE Commercial Water Heating Initiative](#) to move from a focus on commercially rated water heaters to commercial water heating systems. One challenge in defining system aspects and design considerations has been the sizing of equipment. Some members report that ASHRAE guidelines will result in very oversized systems. In this session, those members will share insights regarding the measures, end uses, and system types they have identified as appropriate for incorporation. Participants will also identify performance requirements and necessary capabilities of those system components, explore specification of smart controls for domestic hot water, and discuss the role water heaters can play in commercial thermal storage.

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

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July 22, 2019 Version

Return to 16th Annual Industry Partners Meeting Agenda
Target Outcome: Industry partners will have the opportunity to inform voluntary incentive program design and execution strategies through enhancements to the CEE Commercial Water Heating Initiative. CEE members will lead a collaborate discussion about impactful program design focusing on system efficiency in a whole building context. Attendees will work to achieve consensus on proposed changes to our binational initiative for commercial water heating.

Industry Partners Meeting Adjournment 5:00 p.m.
Day-Ahead Events

UL Test Lab Tour, Plano TX *(CEE Members Only)* 10:00 a.m. – 11:15 a.m.

This tour offers participating CEE members an opportunity to better understand load-based lab testing and the opportunity to interact with the UL staff conducting the testing. Tour participants will see how residential HVAC equipment is tested, will observe how a dual chamber HVAC test facility can be used to simulate a real-world operation, and gain increased understanding of the challenges and benefits of testing equipment performance with equipment operating under its own controls. This information will help CEE continue to assess if the benefits of load-based testing merit the incremental costs, and the extent to which it will cost-effectively address shortcomings of the current DOE performance metrics.

This event is for members only and is limited to the first 20 people who sign up. A bus will depart at 8:30am from the Sheraton, Fort Worth and transport attendees to the UL Test Lab in Plano, TX. Attendees may also secure their own transportation if arriving in Fort Worth that morning. Attendees will then head over to the Lennox International R&D Facility Tour, which begins at Noon. A bus will bring attendees back to the Sheraton, Fort Worth at approximately 4pm.

Tour of Lennox’s R&D Facility *(CEE Members Only)*
12:00 p.m. – 3:00 p.m.

Join us for a special tour of Lennox’s Product Development and Research Center in Carrollton, TX. Attendees will get to see the testing labs and learn more about the OEM’s processes at the facility with a focus on residential equipment and controls. This event is for members only and is limited to the first 20 people who sign up. A bus will bring the group to and from the Fort Worth Sheraton hotel, with a departure time of around 11:00 a.m. and a return time around 4:00 p.m. Lunch will be provided.

Residential HVAC Committee Meeting *(Part I of III)*
4:30 p.m. – 6:00 p.m.

RESIDENTIAL HVAC COMMITTEE I – ELECTRIC, NATURAL GAS, CONNECTED

**CEE Initiative Revision: Designing a Comprehensive Strategy to Support Heating and Cooling Opportunities for Today and Tomorrow**

**Description** CEE is working to revise its longstanding Residential Heating and Cooling Systems Initiative. Members are seeking to address several new or evolved objectives through this particular update, to reflect the myriad of technical, market, and portfolio changes impacting residential HVAC programs. During this session, participants will review the draft revised Initiative strategy, which includes several key approaches:

- Increasing technological advances and variance of heating/cooling options available on the market; the CEE Initiative, therefore, requires a more holistic approach for differentiating high performing products and systems.
• Traditional one-for-one replacement program models may not enable the greatest savings potential given the unique circumstances of each home, consumer, and application; the CEE Initiative must look at program design from a more customized and individualized manner that considers recommendations specific to a given situation or scenario.

• Current federally regulated rating metrics and methodologies for differentiating equipment are not reliable indicators of real-world performance or expected energy savings; a longer-term goal of the Initiative involves identifying reliable metrics that can effectively reflect in-field performance of a diverse range of product types in all climates.

**Target Outcome** Members and industry partners will examine, assess, and weigh in on the collective strategies outlined in CEE’s draft *Residential Heating and Cooling Systems Initiative*, and provide feedback on how to modify content before finalizing a version of the consensus-developed resource. Once finalized, the full Initiative will be brought to the CEE Board of Directors for authorization and publication.

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**Welcome Hour** 5:30 p.m. – 6:30 p.m.

Consortium members have appreciated the chance to meet and greet each other 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 at the hotel.

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**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 world-class restaurants.
“Who Should Attend” Descriptions

Program Design & 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 & 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 & 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