

7:30 a.m. Breakfast & Registration

8:30–10:00 a.m. The Two-Minute Drill

In this fast-paced session, please share the answer to the following items with the Council:

- What have you been spending most of your time on for the past 6 months? What SHOULD you have been spending your time on?
- What role does DSM play at your utility, and what level of support does it receive from upper management? Is it fully integrated into the utility or not?

10:00–10:15 a.m. Break

10:15–11:00 a.m. Trials and Tribulations in Financing

While it's clear that many customers need a way to finance larger energy-efficiency investments, utilities often have a very difficult time offering financing options. This is not a new problem, but it's one that continues to create barriers to the adoption of EE for end users. In this session, we'll discuss the myriad issues surrounding financing options. Topics include:

- Barriers to self-financing
- Barriers to bank/lender financing
- Revolving loan funds
- Perceived and actual risk of default
- Benefits of having financing bundled in—does it boost participation?
- Ideal design of financing options
- Examples of success ... and failure

11:00–11:45 a.m. DSM Department Organization

DSM Executive Council members have been forthcoming with sharing their departmental structures with E Source. We've compiled these structures, and we'll be showing the group some prototypical (if there is such a thing) org charts. That utility's rep on the Council will describe how the organization works; what the pros and cons are; how it relates to other departments of interest such as marketing, corporate communications, account management, and customer care; and what changes are likely to happen in the near future.

11:45 a.m.–12:45 p.m. Survey, then Lunch

12:45–1:30 p.m. Managing Contractor Networks

Everyone is dealing with ever-increasing reliance on trade allies and contractor networks to implement and even market DSM programs. In this session, Council members will share war stories of what has worked and what hasn't in managing contractors.

- What kinds of incentives are given to contractors? What works best?
- How are leads distributed to contractors?
- How is quality assurance conducted?
- What kind of training is offered, and what is required?
- Are contractors rated? Should they be?

1:30 Topical Breakout Sessions

We'll conduct three simultaneous topical breakout sessions from this list. People may select the session of their choice, although we'll try to make sure each group is not too large.

- *Getting Impact Evaluation Right.* How much, what type, and how to get regulatory buy-in. Are changes on the way regarding attitudes toward evaluation (more, less, attribution, etc.).
- *Smart Grid and DSM: How Is It Going?* Are these bumps in the road or does the freeway stop? What kind of pricing/rates options are coming out of smart meter installations?
- *Social Marketing.* How are behavior-change programs coming along? What are some of the innovative approaches?

2:30 p.m. E Source/DSM Executive Council Benchmarking Study**2:45–3:00 p.m. Break****3:00–3:30 p.m. What Will the Next Generation of Programs Look Like?**

DSM has been plugging along for a couple of decades. Will it continue to look the same for the next 5 to 10 years or will it take on different flavors? Will rising goals necessitate different models, better marketing, or both? Will smart grid really create new opportunities for substantial energy savings? The Council should think about innovation in technology, program design, marketing, pricing, and implementation methods.

3:30 p.m. Grab Bag: A Quick-Paced Discussion of Additional Hot Topics

We'll capture ideas that people want to discuss throughout the session, and hit each topic for about five minutes. Ideas include:

- Attribution issues
- Social marketing
- Social media
- Branding/advertising
- Managing consultants
- Evaluation topics

4:30 p.m. Adjourn**5:30 p.m. Reception for the 23rd Annual E Source Forum****7:00 p.m. Dinner Exclusively for the DSM Executive Council**