

How Utility Partners Can Use the New DSM Insights Demand-Response Dashboard



E Source

Rachel Buckley
Jordan Tobey
Matt Leckey

Web conference

Presentation agenda

DSM Insights overview

Demand-Response dashboard introduction

Use cases

Next steps

Q&A



If you work at a utility

Watch the recording of our May 22 web conference [How Utilities Can Use the New DSM Insights Demand-Response Dashboard](#)



How Utilities Can Use the New DSM Insights Demand-Response Dashboard

Jordan Tobey

Learn how to navigate through the new Demand-Response dashboard in E Source DSM Insights. The dashboard contains all the key performance metrics on utility demand-response programs.

Online event

MAY 22, 2019

Today's speakers



Matt Leckey

Director, Business Development
E Source



Rachel Reiss Buckley

Senior Director, Customer Energy Solutions
E Source



Jordan Tobey

Manager, Data Products
E Source



Who is E Source?



We understand utilities because we've made them our business for more than 30 years.

We work with thousands of utility employees and senior leaders across the US and Canada.



We serve ...



100%

of the top 10
largest utility
operating
companies by
revenue

67%

of the top
100 utility
operating
companies by
revenue

60%

of the top
100 investor-
owned
utilities

80%

of the top
10 municipal
utilities

Sample of solution provider clients

AIQUEOUS
Smarter Utilities. Smarter Cities.

AEG
Applied Energy Group

AM CONSERVATION GROUP, INC.
Offering **NIAGARA** CONSERVATION BRAND

bidgely **CADMUS**

DNV·GL

ECOTAGIOUS

EMERSON

FRANKLIN
ENERGY

GDS Associates, Inc.
ENGINEERS & CONSULTANTS

Goldman Sachs

Honeywell
THE POWER OF CONNECTED

ICAST

ICF

BERKELEY LAB
LAWRENCE BERKELEY NATIONAL LABORATORY

MEEA
MIDWEST ENERGY EFFICIENCY ALLIANCE

MichaelsEnergy

Nexant

PERFORMANCE SYSTEMS
DEVELOPMENT

SIMPLE
energy

CLEARResult

efi

Thermostat Recycling
CORPORATION

TRANE

energyX
Energy management for all.

Meeting your data needs to win new utility work



Track filing dates

Find RFPs

Review current programs

Identify incumbent providers

Check measure inputs

Check previous performance

Study previous recommendations

Win work



Meeting your data needs to win new utility work

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Win work



Our tools provide the intel you need



➔ Program and portfolio performance from regulatory filings



➔ Program input data from technical reference manuals



➔ Program profiles from utility websites



➔ Repository of impact and process evaluations



➔ Library of requests for proposals (RFPs), requests for information, and requests for quotations related to energy efficiency and demand response

DSM Insights



Centralized Repository
PROGRAM & PORTFOLIO
Performance Information for the
DSM INDUSTRY

www.esource.com/dsminsights

Gain access to all the DSM data

from those hard-to-find
regulatory filings

And now
from EIA
Form 861
too!

Product coverage



52

states and
provinces



261

program
administrators



7,399

programs



85%

market spend

Who's included



>\$5 million

per year DSM spending



Granular documents are available

Data sources



Plan

Filings

Commission decisions

Portfolio plans

Implementation plans



Actual

Annual reports

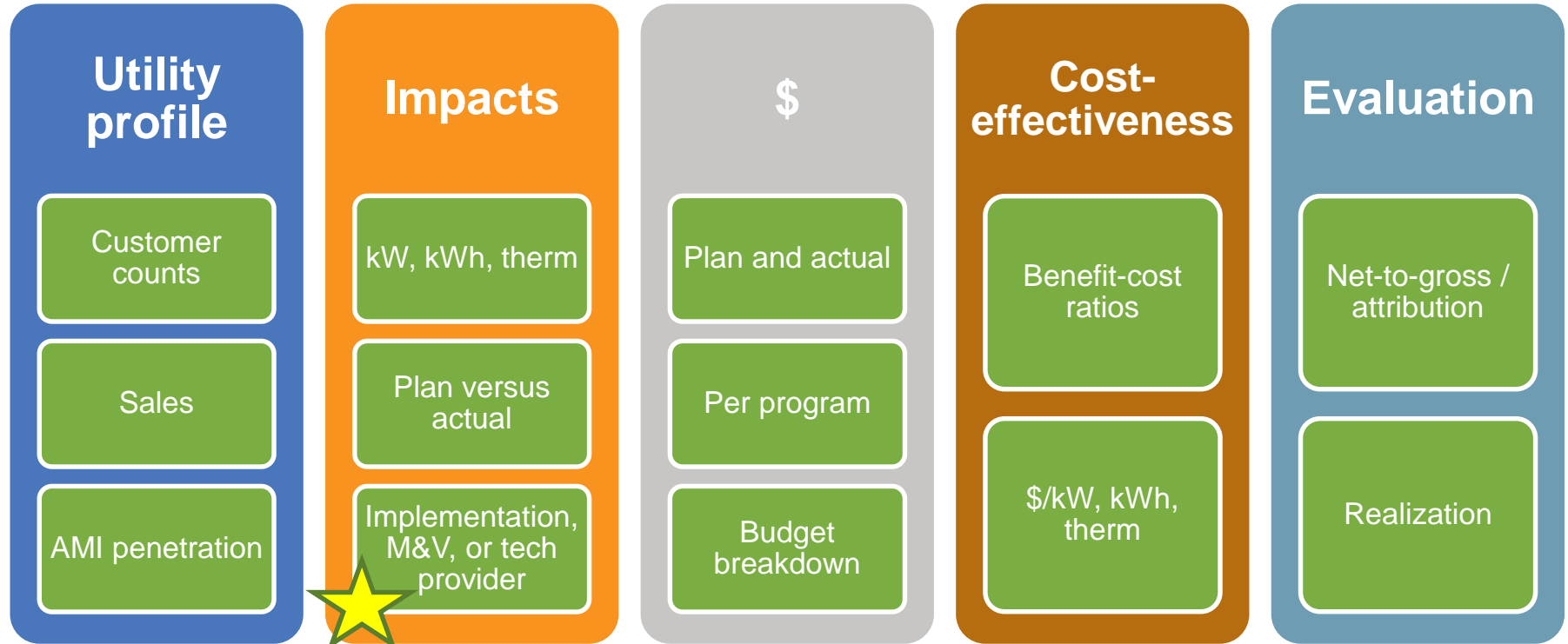
Results portals

Evaluation studies

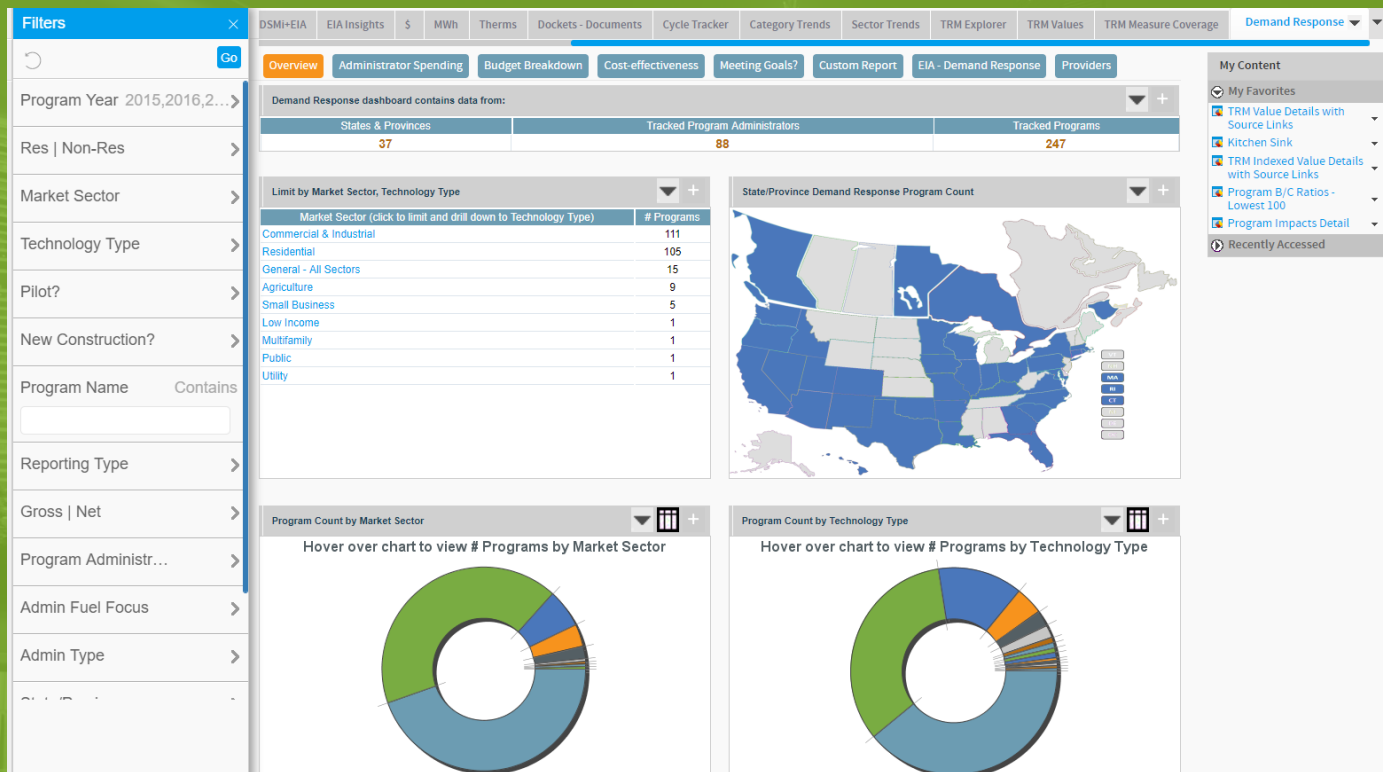
Self-reported results

EIA Form 861 data

DSM Insights contents



NEW! Demand-Response dashboard



NEW! Demand-Response dashboard

- ✓ Pulls all the demand response (DR) info together in one place
- ✓ Benchmarking at your fingertips! Compare programs by:
 - ✓ Cost-effectiveness
 - ✓ Performance compared with their goals
 - ✓ Budget categories such as administration, delivery, incentives, marketing, and evaluation
 - ✓ Costs per customer enrolled
 - ✓ Demand reduction per customer
 - ✓ Percentage of customers enrolled in DR
- ✓ View implementer, evaluator, or technology provider for the program


Demand-Response dashboard methodology

Data gathered from DSM plans, annual reports, and evaluation reports

EIA Form 861, DR file


Every report in the dashboard is prefiltered

Demand Response Program List			▼ +
State/Province	Program Administrator	Program Name	
Minnesota	Xcel Energy - Minnesota	Saver's Switch for Business	
Minnesota	Otter Tail Power Company	Air Conditioning Control	
Minnesota	Otter Tail Power Company	Air Conditioning Control - C&I	
Minnesota	Otter Tail Power Company	Water Heater Store and Save	
Missouri	Ameren Missouri	Business Demand Response	
Missouri	Ameren Missouri	Residential Demand Response	
Missouri	KCP&L	Business Programmable Thermostat	
Missouri	KCP&L	Demand Response Incentive	
Missouri	KCP&L	Residential Programmable Thermostat	
Missouri	KCP&L - Greater Missouri Operations	Business Programmable Thermostat	
Missouri	KCP&L - Greater Missouri Operations	Demand Response Incentive	
Missouri	KCP&L - Greater Missouri Operations	Residential Programmable Thermostat	
Nevada	NV Energy - Nevada Power	Commercial DR - Build	
Nevada	NV Energy - Nevada Power	Commercial DR - Manage	



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Using Measure Insights for DR

Local Measure List with Source Link



Generation, Delivery & Reliability

Jursidiction	TRM Version	Local Measure Name	Technology Hierarchy	Description	Measure Source Link	Reference Link
				design and implementation of a residential demand response program.		
		Direct Load Control of Swimming Pool Pump Motors	.....Load Management	These deemed savings values will provide a benchmark for estimating the annual summer peak demand savings associated with the curtailment of swimming pool filtration system energy usage during periods of high demand via direct load control switches or certain programmable communicating thermostats installed to control the electrical supplies to pool pump motors in detached single-family homes in CenterPoint Houston's service territory. The deemed savings values are on a per-home basis, predicated on basic considerations related to the design and implementation of a residential demand response program.	view source	
	TX - V4.0	Residential Load Curtailment	.....Load Management	Measures participating in a residential load management program may be air-conditioners, heat pumps, swimming pool pumps, or other electricity loads as specified by utility program designs. Specific methods of load management for this measure are not defined and are determined by individual programs. The savings reflect the cumulative effect of all participant actions to reduce residence-wide demand during a load management event.	view source	
		Nonresidential Load Curtailment	.....Load Management	This document presents the deemed savings methodology for participation in a load management program that involves the curtailment of an interruptible load during the summer peak period. Project sponsors, who have agreed to deliver demand savings to the utility from the utility's customer, must commit to an availability of curtailed load throughout the Summer Peak Demand Period. These project sponsors may include national or local energy efficiency service providers (EESPs), retail electricity providers (REPs) or individual customers.	view source	
	TX - V6.0	Smart Thermostat Demand Response	.....Load Management	Deemed demand savings are provided for calling demand response events on smart thermostats in summer afternoons. A demand response event is the process through which a utility may optimize available resources by sending a signal to customers smart thermostats. The signal modifies the smart thermostats temperature setting in order to reduce overall load demand from central refrigerated air conditioning.	view source	

Insights tools usage tips

Tips



- ➔ Don't use the back button in your browser
(Use in-tool breadcrumbs and x instead)
- ➔ Use Chrome as your browser when possible

Insights tools functionality

Tips



Blue text = click through to next level of info



= export

Report



Dashboard > RM Version

Show Filter Values



= in-tool navigation



= switch to table view



= maximize table to enable column sorting

If the hovers don't work for you

Tips



Use Firefox

or



Turn off your touchscreen in Chrome.

Instructions are here: www.esource.com/DSMI-About-Usage-Tips/Usage-Tips-DSMI

Enter *chrome://flags/#touch-events* into the browser search bar, select Disabled from the drop-down menu, and click Relaunch Now.

These aren't just products



Access to our team

Training and customer support



Monthly scheduled training sessions;
custom training upon request



In-tool help menu with recorded training



Quarterly engagement check-in meetings



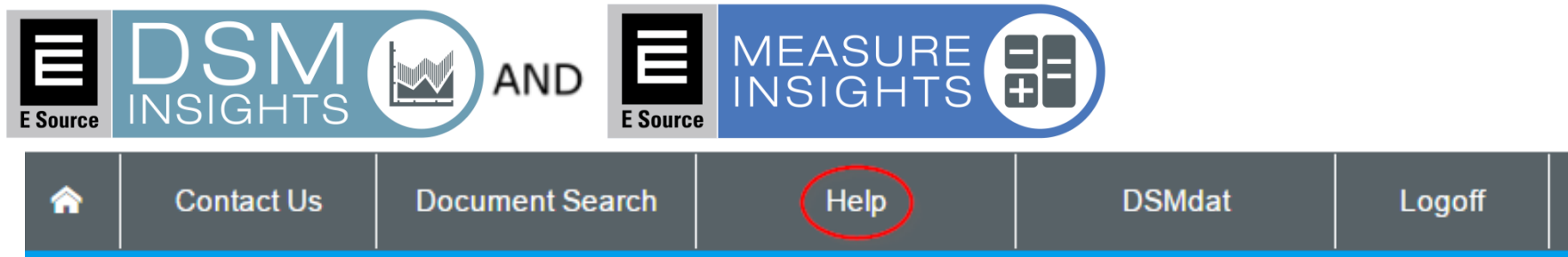
On-demand technical support



Monthly newsletter with usage tips, tool
updates, and training dates



“Help” takes you to the resource center



Dashboard

Contains on-demand training, dashboard overviews, definitions, usage tips, FAQs, data trends, and what's new

Don't miss the monthly newsletter

[View online](#) | [Send to a friend](#)

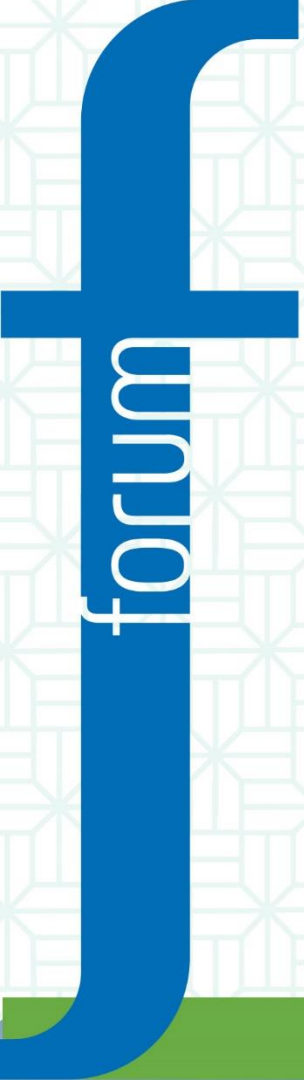


January 2019

Happy New Year from your E Source and QuadROI teams!

We hope your 2019 is off to a great start. In this issue, we're excited to share some of the updates we made to [DSM Insights](#) and [Measure Insights](#) in 2018. If you feel like your team needs training on the tools, wants to dive deeper into any of the data or new features, or wants to learn more about how to apply the data to your business needs, please schedule time to talk with us. You can [book directly on Rachel Buckley's calendar](#). We look forward to making 2019 a great year for you.

Sign up at
www.esource.com/email_preferences



E SOURCE FORUM 2019

September 17-20

Sheraton Denver
Downtown

1550 Court Place
Denver, Colorado



www.esource.com/forum2019

Ready to dive into the data?



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calendly.com/matt_leckey/discovery-call

For more information



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DSM tools at a glance

					
Intent	Open and historical RFPs	Program inputs	Program profiles	Program and portfolio results	“Why” behind results
Measure attributes		✓			
Baseline assumptions		✓			
Incentives			✓		
Measures			✓		
Results				✓	✓
Spending				✓	
Source	Utility RFPs	Technical reference manuals	Utility websites	Filings	Impact and process evaluations





DSM tools to make your life easier

Measure Insights gives us program input data;

DSMdat provides us with who's doing what;

DSM Insights tells us how utilities are actually performing;

DSM Evaluation Library offers the story behind program performance.

				
Intent	Program inputs	Program profiles	Program and portfolio results	"Why" behind results
Measure attributes	✓			
Baseline assumptions	✓			
Incentives		✓		
Measures		✓		
Results			✓	
Spending			✓	
Source	Technical reference manuals	Utility websites	Filings	Impact and process evaluations

DSM benchmarking with E Source

Self-service

Tools



Syndicated, semicustom

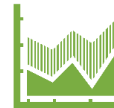
Research



Ask
E Source



Technology
Assessment
Service



Demand-Side
Management
Service

Service bureau

Consulting

