

EPC-15-074

Knowledge Transfer Plan

Meeting Customer and Supply-side Market Needs
with Electrical and Thermal Storage, Solar, Energy
Efficiency and Integrated Load Management
Systems

Prepared for
California Energy Commission

Prepared by
Center for Sustainable Energy



Center for
Sustainable
Energy™

Cite this reference as Bull, P., Hart, J. & Barich, A. 2019, *Meeting Customer and Supply-side Market Needs with Electrical and Thermal Storage, Solar, Energy Efficiency and Integrated Load Management Systems*, EPC-15-074: Technology & Knowledge Transfer Plan, Center for Sustainable Energy.

© 2019 Center for Sustainable Energy

Disclaimer: The Center for Sustainable Energy® (CSE) has made every attempt to ensure the accuracy and reliability of information provided in this report. However, the content is presented “as is” without warranty of any kind. CSE does not accept any responsibility or liability for accuracy, completeness, legality or reliability to the information contained herein. No promises and/or representations of any kind, expressed or implied, are given as to the nature or standard of the information provided nor to the suitability of the information to your circumstances. Center for Sustainable Energy, CSE and CSE logo are registered trademarks of the Center for Sustainable Energy.

CSE Headquarters

Center for Sustainable Energy
3980 Sherman Street, Suite 170
San Diego, CA 92110
858-244-1177
EnergyCenter.org

CSE Offices

Los Angeles, CA • Oakland, CA • Sacramento, CA • Boston, MA • Brooklyn, NY • Stony Brook, NY

Contents

I.	Executive Summary.....	4
II.	Knowledge Transfer Strategic Approach	5
	Audiences.....	5
	Channels.....	6
	Strategy by Target Audience.....	7
	Commercial site managers/energy managers and vendors	7
	Consultants	9
	Technical Advisory Committee	11
	Outreach Collateral Materials.....	13
	Project Fact Sheets.....	13
	Webinars	13
	Dedicated Project Webpage	13
III.	Informing State Energy Policy	14
	Policy Development	14
	California Public Utilities Commission	14
	California Independent System Operator	15
IV.	Completed Events and Publications	16
V.	Timeline of Remaining Knowledge Transfer Activities	18
	Q2 – 2019.....	18
	Q3 – 2019	18
	Q4 – 2019.....	19
	Q1 – 2020.....	20

I. Executive Summary

Increasing amounts of distributed energy resources (DERs), such as solar, wind and energy storage, present opportunities to optimize and balance California’s electricity grid through demand response participation in wholesale energy markets. The Center for Sustainable Energy (CSE) and its industry partners SolarCity (doing business as Tesla Inc), Conectric Networks, Olivine Inc and DNV-GL, will test the ability of DERs to cost-effectively accomplish their main purpose of meeting on-site electricity needs while also providing services to the grid.

This project, EPC-15-074, Meeting Customer and Supply-side Market Needs with Electrical and Thermal Storage, Solar, Energy Efficiency and Integrated Load Management Systems, will configure and test two DER portfolios. The first portfolio consists of five schools within the Chino Valley Unified School District equipped with solar and energy storage. The second portfolio consists of two Hilton hotels (Garden Inn San Diego Old Town and Mission Valley)

CSE has more than 20 years of experience administering marketing, education and outreach for a diverse portfolio of clean energy and energy efficiency technologies and programs.

integrated with advanced energy efficiency sensors and controls. Results of the demonstration studies will allow stakeholders to better understand the technical, institutional and regulatory barriers to facilitating DER participation in supply-side markets.

The following goals have been identified to support knowledge transfer activities.

- Create an external, web-based interface to communicate program lessons learned
- Develop materials that present findings to various target audiences
- Present recommendations to audiences on- and off-site (tours and events)

This knowledge transfer plan lays out a road map to achieving these goals through several strategic tactics. It is formed in accordance with the California Energy Commission (Energy Commission) guidelines contained in project scope of work, task number 13, along with specific requests made by the assigned contract agreement manager (CAM). The goals of CSE’s technology/knowledge transfer activities are to convey data and information gained from the project and make it available to the public, including the targeted market sector and potential outreach to end users, utilities, regulatory agencies and others.

II. Knowledge Transfer Strategic Approach

This knowledge transfer plan aims to move people through the journey from initial awareness of the demonstration pilots to the application and adoption of specific DER technologies, practices and policies. Specifically, this implies engaging with audiences from the beginning—those who have never heard of this project—through to those who are consuming information and communications from it and all the touch points in between. All marketing will be developed to reach target audiences where they currently are in their journey by providing the right level and amount of information they need to move to the next phase of the journey, as shown in Figure 1.

Figure 1: Overview Diagram of Audience Journey



Our approach is divided into individual strategies based on key audience type, which is further subdivided into detailed tactics framed by goals, key performance indicators and tracking metrics tied to strategic outreach channels per given audience type. Specific outreach materials, i.e., collateral, including but not limited to webinars and a dedicated project website, are also detailed at the end of this section.

Audiences

Reaching people involves understanding and speaking to their specific needs. To do so, this plan categorizes people into different target audiences. Different audiences will respond better to key messaging and tactics tailored to highlight the benefits for that specific audience. Table 1 identifies those benefits at a high level and indicates an estimated audience split. Identifying the audience split will help direct more resources to larger audiences.

Table 1: Target Audiences for Knowledge Transfer

Audience	Role	Program Benefits	Projected Audience Split
Commercial site managers & energy managers	Participate in bidding into the wholesale market while meeting on-site electricity needs	Earn revenue in the wholesale market while still meeting on-site energy needs	30%
Consultants (e.g., subcontractors Olivine, DNV-GL, etc.)	Conduct audits, assessments and system evaluations using data and research	Research that helps back their advisory services	20%

Audience	Role	Program Benefits	Projected Audience Split
Vendors (e.g., Tesla, Conectric)	Install DER technologies	Sales tactic to acquire new customers	30%
Regulatory bodies (e.g., CAISO, Energy Commission, CPUC)	The client and other connected regulatory bodies	Research that helps inform their regulatory policies	15%
Technical Advisory Committee	Representatives from regulatory bodies, consultants, academics	Research that their audiences would be interested in	5%

Channels

Recognizing that some channels are more effective with certain target audiences than others, our strategic approach ensures the most efficient and effective channels are used for each audience. Building in feedback and evaluation metrics will further help us refine our selections over time.

The following table indicates which channels will be used to reach each target audience. Specific channel tactics are further detailed in relation to each audience.

Table 2: Channels for Reaching Target Audiences

Audience \ Channel	Commercial Site Managers and Energy Managers	Vendors	Consultants	Regulatory Bodies	Technical Advisory Committee
<i>DIGITAL</i>					
Emails					
Reports, infographics, blueprint flowchart					
Webinars					
Website					
<i>IN-PERSON</i>					
Conferences and trade shows (presentations)					
Content kit					
Tours and events					
<i>MEDIA</i>					
Trade publications					

Strategy by Target Audience

Commercial site managers/energy managers and vendors

CSE has determined that commercial site managers, energy managers and vendors can be reached effectively using similar strategic knowledge transfer approaches.

Personas overview

Commercial site managers are looking to save their business money and time while still meeting on-site electricity needs. They may receive new job-related information from trade and business associations, insurance policies, industry journals and networking events.

Their goal is to comply with regulations and make a profit. They may get information from online industry journals and networking events.

Energy managers may be responsible for supporting LEED certification of green buildings or reporting greenhouse gas data to support voluntary climate commitments. They may deal with utility procurement, ensuring that the company or client is getting the best value. They write reports, work plans and evaluation plans and submit them to management.

Many energy managers are employed by manufacturing companies (energy-intensive industry). Colleges and universities also frequently employ energy managers, as well as federal and state government agencies (military bases, government offices, etc.).

Energy managers and commercial site managers often work together to accomplish similar goals.

Meanwhile, vendors are seeking to comply with regulations and make a profit. They may gain new job-related information from online industry journals and networking events. Examples of vendors may include Tesla or Conectric.

User journey

The first interaction these personas will have with this project likely will take one of the following paths.

- Learning about EPIC STEEL at a conference or trade show presentation
- Through word of mouth at industry association events

Next steps are to visit the EPIC STEEL website, which leads them to white papers, webinars and facility tours. If interested in EPIC STEEL for their own commercial site, they would likely do one or more of the following actions.

- Download and review white papers
- Review the case studies
- Register for a webinar
- Register for a portfolio site tour
- Download the flowchart blueprint
- Download and review the final report

Key messages

These will be narrowed as project findings become more apparent. At the outset we have identified the following messaging.

Commercial site managers/energy managers

- Accomplish your on-site energy needs and earn extra revenue
- Projects can be achieved at existing facilities (if results are favorable X, if results are not favorable here is what we learned Y)
- Our blueprint provides a path to implement new DER technologies
- Review our white papers for real-world examples of multiple-use applications and value stacking for DERs

1. Vendors

- Learn how you can leverage our research and data for your own sales practices
- Our case studies showcase technologies and implementation tactics
- View our white papers for real-world examples of multiple-use applications and value stacking for DERs

Tactics

Using the channels outlined in the overview, the following tactics aim to reach these target audiences where they spend their time. Tactics are broken out into paid, earned, shared and owned platforms and are defined by a conversion metric and measured by key performance indicators (KPIs).

Paid

1. Attend and secure speaking roles at relevant trade shows and conferences

Executed by project team with no support from marketing team

- Conversion metric: Secured speaking engagement
 - KPIs
 - Number of speaking engagements
 - Approximate number of people in audience at each engagement
 - Number of email list sign ups

Earned

2. Engage trade media with case study/building tour/interview opportunity with subject matter expert

- Conversion metric: Published news story in trade media
 - Key performance indicators (KPIs)
 - Number of mentions in news media
 - UVM/UVD per media mention

Shared

None identified

Owned

Develop, evaluate and optimize

3. Digital/printable collateral

- Conversion metric: Drive viewers to website
 - KPIs
 - Website visits directly attributable to collateral
 - Collateral downloads from website

4. Targeted email communications

- Conversion metric: Drive readers to designated website landing page
 - KPIs
 - Click-through rate (CTR)
 - Bounce rate
 - Time spent on landing page
 - Event registrations (referrals)

5. Webinar series

- Conversion metric: Registration for webinars
 - KPIs
 - Number of registrations
 - Number of attendees

6. Portfolio site tours

- Conversion metric: Tour attendance
 - KPIs
 - Number of attendees
 - Number of registrations
 - Attendance rate

7. Website content

Including project homepage, reports, case studies, white papers, webinars, site tours, one-pagers and email sign-up

- Conversion metric: Downloads of online resources
 - KPIs
 - Path (i.e., clicks) through website
 - Website page visits, time spent on site, return visits

Consultants

Persona overview

Consultants are a type of middleman industry. Generally, they have been known to read and interpret reports put out by regulating bodies like the Energy Commission and use that knowledge and subject matter expertise to attract clientele in need of their services.

User journey

This persona's first interaction with this project will likely take one of the following two paths.

- Business development team member hears about EPIC STEEL at a conference or trade show presentation
- Learns about project through word of mouth at industry association events

Next steps are to visit the EPIC STEEL website, which leads them to white papers, webinars and facility tours. If interested in EPIC STEEL for their own commercial site, they would likely do one or more of the following actions.

- Download and review white papers
- Review the case studies
- Register for a webinar
- Register for a portfolio site tour
- Download the flowchart blueprint
- Download and review the final report

Key messages

These will be narrowed as project findings become more apparent. At the outset we have identified the following messaging.

- Learn how you can leverage our research and data for your own consultant practices
- Our case studies showcase technologies and implementation tactics
- View our white papers for real-world examples of multiple-use applications and value stacking for DERs

Tactics

Using the channels outlined in the overview, the following tactics aim to reach these target audiences where they spend their time. Tactics are broken out into paid, earned, shared and owned platforms and are defined by a conversion metric and measured by KPIs.

Paid

1. Attend and secure speaking roles at relevant trade shows and conferences

Executed by project team with no support from marketing team

- Conversion metric: Secured speaking engagement
 - KPIs
 - Number of speaking engagements
 - Approximate number of people in audience at each engagement
 - Number of email list sign ups

Earned

None identified

Shared

None identified

Owned

Develop, evaluate and optimize

2. *Targeted email communications*

- Conversion metric: Drive readers to designated website landing page
 - KPIs
 - Click-through rate (CTR)
 - Bounce rate
 - Time spent on landing page
 - Event registrations (referrals)

3. *Webinar series*

- Conversion metric: Registration for webinars
 - KPIs
 - Number of registrations
 - Number of attendees

4. *Website content*

Including project homepage, reports, case studies, white papers, webinars, site tours, one-pagers and email sign-up

- Conversion metric: Downloads of online resources
 - KPIs
 - Path (i.e., clicks) through website
 - Website page visits, time spent on site, return visits

Technical Advisory Committee

Persona overview

The Technical Advisory Committee (TAC) is made up of representatives from regulatory bodies, consultants and academics in the industry with expertise in energy efficiency, energy storage and demand side management and response. They are primarily interested in the research and outcomes of the EPIC STEEL demonstration project. CSE will leverage expertise and relationships with TAC members to transfer findings from this demonstration.

User journey

This persona's first interaction with this project will be the following.

- Applied and selected to join the Technical Advisory Committee

Next steps are to visit the EPIC STEEL website, which leads them to white papers, webinars and facility tours. If interested in sharing EPIC STEEL with their network, would likely do one or more of the following.

- Download and review white papers
- Review the case studies
- Register for a site tour

- Download the flowchart blueprint
- Download and review the final report

Key messages

These will be narrowed as project findings become more apparent. At the outset we have identified the following messaging.

- Your expertise is helping to inform this project
- Share your involvement with your network

Tactics

Using the channels outlined in the overview, the following tactics aim to reach these target audiences where they spend their time. Tactics are broken out into paid, earned, shared and owned platforms and are defined by a conversion metric and measured by KPIs.

Paid

None identified

Earned

None identified

Shared

1. Content kit

Provide a kit of content and imagery to the TAC to implement on their own internal and external communication channels (newsletters, intranet, blog) and social media channels

- Conversion metric: Published content and media posts on TAC’s channels
 - KPIs
 - Mentions on partner shared channels
 - Referrals from partner shared platforms

Owned

Develop, evaluate and optimize

2. Targeted email communications

- Conversion metric: Drive readers to designated website landing page
 - KPIs
 - Click-through rate (CTR)
 - Bounce rate
 - Time spent on landing page
 - Event registrations (referrals)

Outreach Collateral Materials

Project Fact Sheets

CSE plans to create a series of final project fact sheets that will speak to the commercial site managers/energy managers and vendors audiences. Fact sheets will be available for download from the project website, as well as referenced in targeted email communications.

Fact sheet content includes the following.

- Initial project fact sheet
- Case study and/or white paper for each portfolio site
- Series of final fact sheets
- Industry blueprint that would help educate potential customers and vendors on steps to assess market potential and market enrollment processes at CAISO
- Final project fact sheet

Webinars

Webinars will be publicized through targeted email communications and on the project website. Webinar content ideas are targeted by the following audiences.

Commercial site managers/energy managers and vendors

- How to reduce energy and utility costs (and cost uncertainty) for your facilities and/or commercial sites
- A deep dive into facility and commercial site energy usage – how to reduce the risk of costly unplanned equipment purchases or operational failures

Consultants

- Additional value streams
- Direct metering lessons learned
- Frequency regulation
- Ancillary services
- Spinning reserves

Dedicated Project Webpage

CSE will further develop a dedicated project website that will be used as the central information hub for project final reports and collateral outreach materials, e.g., fact sheets, webinar announcements and records, etc. The current website is located at energycenter.org/program/integrating-distributed-energy-resources-wholesale-energy-markets.

Enhancements to this website will include developing landing pages for each of our target audiences and realigning existing content to match audience pathways.

III. Informing State Energy Policy

As part of the project, CSE will inform policy guidelines for both local and state governments. The following sections have information about local and state policy developments that this project hopes to influence with its analysis and observations.

Policy Development

Utilizing our extensive on-the-ground program implementation experience, CSE provides a much-needed, objective feedback loop from the energy marketplace to policymakers to go beyond program execution. CSE provides policymakers with insights into how policies and programs are working to affect the energy marketplace and how they may be improved and integrated. Key California policymaking forums that we are engaged in through this demonstration project are described further.

California Public Utilities Commission

Following is the list of current California Public Utility Commission (CPUC) proceedings that are related to this demonstration project.

- [Demand Response \(R.13-09-011\)](#): Rulemaking to enhance the role of demand response for resource planning. This proceeding is considering changes to demand response programs that participate in the wholesale market. Specifically, the proceeding created the Supply-Side Working Group (SSWG) in which Olivine has participated as an active member. The SSWG is currently finalizing its final report to the CPUC which includes policy recommendations from Olivine informed, in part, by the STEEL project. Additionally, the CPUC is revising the Demand Response Auction Mechanism (DRAM) in which behind-the-meter resources participate directly into the wholesale market. CSE plans to provide relevant feedback to the Commission as it gains more experience in the market.
- [Demand Response 2018-2022 Program Applications \(A.17-01-012\)](#): Rulemaking to decide program rules and funding levels for demand response programs, including supply-side demand response that is bid into the wholesale market.
- [Long-Term Procurement Proceeding \(current cycle\) \(R.16-02-007\)](#): Evaluates the needs for grid capacity at system, local and flexible needs on a 10-year-ahead basis.
- [Self-Generation Incentive Program \(R.12-11-055\)](#): Rebates for qualifying distributed energy systems installed on the customer's side of the meter, including energy storage technologies. The CPUC has solicited feedback on behind-the-meter storage's ability to participate in the wholesale market and whether SGIP-incentivized projects should be required to participate in the market. CSE has filed several sets of comments to the CPUC providing recommendations, lessons learned, and best practices on wholesale market as developed through the STEEL project.
- [Energy Storage \(R.15-03-011\)](#): This proceeding refined policies and program details for the Energy Storage Procurement Framework and considered recommendations from the California Energy Storage Roadmap, jointly developed by the CAISO, Energy Commission and CPUC. While this proceeding closed in 2018, there are several open-ended policy questions regarding multiple-use applications and value stacking for energy storage systems that the CPUC is

expected to address in a future rulemaking(s). CSE participated in the Storage Multiple Use Applications (MUA) Working Group from February to August 2018. The MUA Working Group was identified in D.18-01-003 to conduct related storage rule refinement and discussion of issues. CSE noted that the Tesla batteries across the Chino Hills Schools in Portfolio 1 represented one of the few behind-the-meter storage resource that is participating in the CAISO wholesale market as MUA resources. The MUA Working group final report was issued in August 2019.¹

- Distribution Resources Plan (R.14-08-013): This proceeding is evaluating the locational benefits of customer-sited DERs and their ability to provide grid benefits. This proceeding addresses the topic of DERs providing multiple-use applications.
- Integrated Distributed Energy Resources (R.14-10-003): This proceeding is focused on creating more integrated and holistic approaches to DER planning and operation. The goal is to more closely integrate energy efficiency, customer-sited generation and energy storage, electric vehicle charging and other load management technologies and strategies.

California Independent System Operator

Energy Storage and Distributed Energy Resources (ESDER) Initiative: This initiative is currently in its fourth iteration.² Through this initiative, the CAISO is reforming participation rules and models for energy storage systems and customer-sited resources. The changes made through this proceeding have had a direct impact on this demonstration project, and this project's lessons learned could directly inform future iterations of the ESDER initiative.

- CSE and Olivine have participated in ESDER stakeholder meetings spanning both Phase III (2017-2018) and Phase IV (2018-current).
- Directly related to project tasks 9, CSE will conduct research and report on the accuracy and precision of proxy demand response (PDR) baseline methodologies used for settlement purposes at the CAISO.

¹ Multiple-Use Applications for Energy Storage: Final Working Group Report. CPUC Decision D.18-01-003 in Rulemaking R.15-03-011. Published August 9, 2018. URL: [http://www3.sce.com/sscc/law/dis/dbattach5e.nsf/0/0EF9A015334951F8882582E4007ACC53/\\$FILE/R1503011-SCE%20MUA%20Working%20Group%20Report.pdf](http://www3.sce.com/sscc/law/dis/dbattach5e.nsf/0/0EF9A015334951F8882582E4007ACC53/$FILE/R1503011-SCE%20MUA%20Working%20Group%20Report.pdf).

² CAISO ESDER Initiative, URL: http://www.caiso.com/informed/Pages/StakeholderProcesses/EnergyStorage_DistributedEnergyResources.aspx

IV. Completed Events and Publications

Table 3 lists the outreach collateral that CSE has completed, including conference speaking opportunities and published materials.

Table 3: Events and Publications Completed to Date

Event or Publication	Description	Target Audience	Audience Size	Date
2017 CAISO Stakeholder Symposium	Pierre Bull and Jon Hart of CSE attended this event to conduct project outreach and gain a stronger understanding of key policies and technology applications impacted by the project.	Consultants, vendors and regulatory bodies	~20 individuals reached via breakout conversations	October 2017
Project Technical Advisory Committee (TAC) Meeting #1	Pierre Bull and Jon Hart of CSE led the meeting presentation with contributions from Elish Gilfenbaum of Tesla, Philip Kopp of Conectric Networks and Robert Anderson of Olivine.	TAC	7 TAC Members	October 2017
CEC Project Portfolio Site Visits Chino Hills and San Diego, CA	The project team hosted the CEC agreement manager to site visits at the Chino Hills High School with Tesla battery storage units and the Hilton Garden Inn Old Town San Diego outfitted with Conectric Networks smart efficiency sensors and controls.	Commercial site and energy managers vendors, regulatory bodies	7 individuals across both site hosts	October 2017
2018 EPIC Symposium (CEC) Sacramento, CA	Project subcontractor, Philip Kopp of Conectric Networks, presented on his company's work using detailed data collection, equipment automation and ongoing strategy development to assist large hotels in participating in wholesale grid resource markets while reducing customer energy costs and meeting strict customer hospitality requirements.	Commercial site and energy managers, consultants, vendors, and regulatory bodies	~50 individuals attended the presentation ~20 individuals reached via breakout conversations	February 2018
Infocast Energy Storage Week San Francisco, CA	Jon Hart of CSE was a panel speaker at this event with topical conversations designed around energy storage implementation with an emphasis on sharing lessons learned and best practices.	Consultants, vendors, and regulatory bodies	~100 individuals attending the panel session	February 2018

Event or Publication	Description	Target Audience	Audience Size	Date
Project TAC Meeting #2	Presentation delivered by Pierre Bull of CSE and Robert Anderson of Olivine;	TAC Members	6 TAC members	March 2018
Inaugural Energy Storage Technologies and Applications Conference UC Riverside, CA	Jon Hart of CSE attended this event with primary themes focused on two pillars of energy storage technologies, including battery as well as system integration, operation, and business models for energy storage across a variety of applications.	Consultants, vendors, and regulatory bodies	~100 individuals attended the panel session	April 2018
New York Energy Market Summit	Pierre Bull of CSE was a panel speaker on panel, <i>Lessons Learned Managing Demonstration Pilot Projects</i> . [Note that funding for conference registration, travel and accommodations was provided by Center for Sustainable Energy.]	Consultants, vendors, and regulatory bodies	~75 individuals attended the panel session	August 2018
6th Annual HOMER International Microgrid Conference San Diego, CA	Pierre Bull of CSE was a panel speaker at this event focused on distributed energy resources technology, design and applications.	Consultants and vendors	~150 individuals attended the conference presentation ~15 individuals reached via breakout conversation	October 2018
Peak Load Management Alliance (PLMA) Future of DER Compendium	The PLMA publishes an annual compendium highlighting innovative technology approaches to reducing peak load. The Spring 2019 issue featured this demonstration project in an article that was lead-authored by Pierre Bull and Jon Hart of CSE. The PLMA also provided a publication webinar and presentation of the Compendium at the 39 th Annual PLMA Conference.	Consultants, vendors, and regulatory bodies	~100 individuals attended the webinar ~150 individuals attended the conference presentation	April-May 2019

V. Timeline of Remaining Knowledge Transfer Activities

CSE has established the following plans for remaining knowledge transfer activities.

Q2 – 2019

May

- Abstract submitted by James Tamerius of CSE titled, *Bidding Curtailed Energy into CAISO's Wholesale Energy Market*, for selection into the November 8, 2019, [University of San Diego School of Law Eleventh Annual Lesley K. McAllister Symposium on Climate and Energy Law](#). Key topics of the event include the “Future of Electricity Procurement” geared toward regulatory bodies and consultant audience types. If selected for presentation at the November Symposium, the University of San Diego will publish the full article in its Eleventh Volume of the [University of San Diego Journal of Climate & Energy Law](#).

June

- Deliver the **Knowledge Transfer Plan Report** to CEC
- Jon Hart and Pierre Bull of CSE are currently drafting an article on the project, discussing behind-the-meter resources' ability to provide multiple-use-applications [in Wiley Natural Gas and Electricity Journal](#). Target audience includes consultants, vendors, and regulatory bodies with a monthly newsletter distribution e-mail list numbering in the thousands. The article is expected to be included in the August issue of Wiley's journal.

Q3 – 2019

July

- Jon Hart of CSE to speak at the [7th Annual California Energy Summit 2019](#) in Los Angeles on July 16 on panel titled, [Integrating Distributed Energy Resources \(DERs\) into Wholesale Energy Markets](#). Target audiences at this event includes consultants, vendors, and representatives from state and local regulatory bodies.
- Expected release of ACEEE research paper on program examples of Integrated Energy Efficiency and Demand Response/Distributed Energy Resource Programs, which will include a summary of the two portfolios in this demonstration project. ACEEE Senior Research Associate Rohini Srivastava conducted a phone interview and follow-up email communications with Pierre Bull and Jon Hart of CSE during April and May 2019 to gather information on the project.
- **CSE project website** expansion launch.
- Begin drafting project **final fact sheet(s)** (likely to take on multiple forms with messages and key points crafted to resonate with each target audience type).

August

- CSE to send quarterly **email** update to consultants, vendors, TAC members and others signed up to the project email listserv.

- Expected release of the project article by Jon Hart and Pierre Bull of CSE, discussing behind-the-meter resources' ability to provide multiple-use-applications in the August issue of Wiley's Natural Gas and Electricity Journal.

September

- **Webinar** series starts.
- [Tentative / contingent upon selection] [Renewable Energy Markets Summit](#) in San Diego, September 4-6, 2019. Abstract submitted in April 2019, titled, "... " is awaiting conference organizers' final selection decision. Target audiences include consultants, vendors and representatives from state and local regulatory bodies.
- CSE to update project website to include webinar link(s) and/or recording(s), as well as downloadable links to completed interim task reports and fact sheets.

Q4 – 2019

October

- CSE to send quarterly **email** update to consultants, vendors, TAC members and others signed up to the project email listserv.
- Portfolio site **tours**.
- Pierre Bull of CSE to speak at [Getting to Zero Forum](#) in Oakland, CA on October 11, 2019. The forum aims to continue the work of the 2018 Global Climate Action Summit with a focus on scaling energy and zero carbon buildings by developing tangible pathways for stakeholders in the building and utility industries to pursue. Key audience types include regulatory bodies, commercial site and energy managers, vendors and consultants.
- [Tentative/contingent upon selection] James Tamerius of CSE to submit full article, *Bidding Curtailed Energy* into *CAISO's Wholesale Energy Market*, to the University of San Diego for publication in the Eleventh Volume of the University of San Diego Journal of Climate & Energy Law (see link above listed under May 2019).

November

- [Tentative/contingent upon selection] James Tamerius of CSE to present article, *Bidding Curtailed Energy into CAISO's Wholesale Energy Market*, at the November 8, 2019, University of San Diego School of Law Eleventh Annual Lesley K. McAllister Symposium on Climate and Energy Law.
- CSE to update project website to include webinar link(s) and/or recording(s), as well as downloadable links to completed interim task reports and fact sheets.

December

- Deliver the "final draft" of the **project final report** to the CEC.
- Deliver "final draft" **project fact sheet(s)** to the CEC.
- CSE to send quarterly **email** update to consultants, vendors, TAC members and others signed up to the project email listserv.

Q1 – 2020

January

February

- Deliver the **final project final report** to the CEC.
- Deliver the **final project fact sheet(s)** to the CEC.
- CSE to send final report in final **email** update to consultants, vendors, TAC members and others signed up to **the** project email listserv.
- CSE to update project website with downloadable link to the project final report and other outreach materials, presentations or webinars completed since December 2019.

March

- Deliver the final **Technology/Knowledge Transfer Report** to the CEC.
- Deliver all project outreach collateral, photos and media to the CEC.



Center for
Sustainable
Energy™

One simple mission — DECARBONIZE.

The Center for Sustainable Energy® (CSE) is a nonprofit offering clean energy program administration and technical advisory services. With the experience and streamlined efficiency of a for-profit operation, CSE leads with the passion and heart of a nonprofit. We work nationwide with energy policymakers, regulators, public agencies, businesses and others as an expert implementation partner and trusted resource.

EnergyCenter.org