



# Q1 – 2024 COLORADO DSM ROUNDTABLE

May 8, 2024



# AGENDA

- 1:00 p.m. Welcome and DSM Regulatory Updates
- 1:10 p.m. Introduction/Staff Reorganization
- 1:15 p.m. Q1 Achievement Update
- 1:30 p.m. Lighting Updates
- 1:40 p.m. IQ/DI Outreach and Engagement
- 2:00 p.m. RFP Updates
- 2:25 p.m. ---- BREAK ----
- 2:40 p.m. Procurement Process Evaluation Update
- 3:10 p.m. Business Program Evaluations



# DSM REGULATORY UPDATES

Gina Gargano-Amari | DSM Regulatory



# Q1 60-Day/90-Day Notices

## 2023 DSM/BE Plan Settlement

- N/A

# DSM Regulatory Calendar

## 2024-2026 DSM + BE Plan | Proceeding No. 23A-0589EG

- Prehearing Motions: May 8<sup>th</sup>
- Responses to Prehearing Motions: May 10<sup>th</sup>
- Evidentiary Hearing: May 13<sup>th</sup>-17<sup>th</sup>
- Statements of Position: June 7<sup>th</sup>
- Deadline for Final Commission Decision: September 24<sup>th</sup>

## Clean Heat Plan | Proceeding No. 23A-0392EG

- Deadline for Final Commission Decision: May 28<sup>th</sup>

# DSM Regulatory Calendar

## Upcoming Roundtables - Save the Date!

- Q2 - 2024 – August 14<sup>th</sup>, 2024
- Q3 – 2024 – November 13<sup>th</sup>, 2024

## Planned Potential Study Working Group Meetings

- May 29<sup>th</sup>, 2024 10:00-11:30 AM
- June 10<sup>th</sup>, 2024 1:00-2:30 PM
- July 9<sup>th</sup>, 2024 1:00-2:30 PM

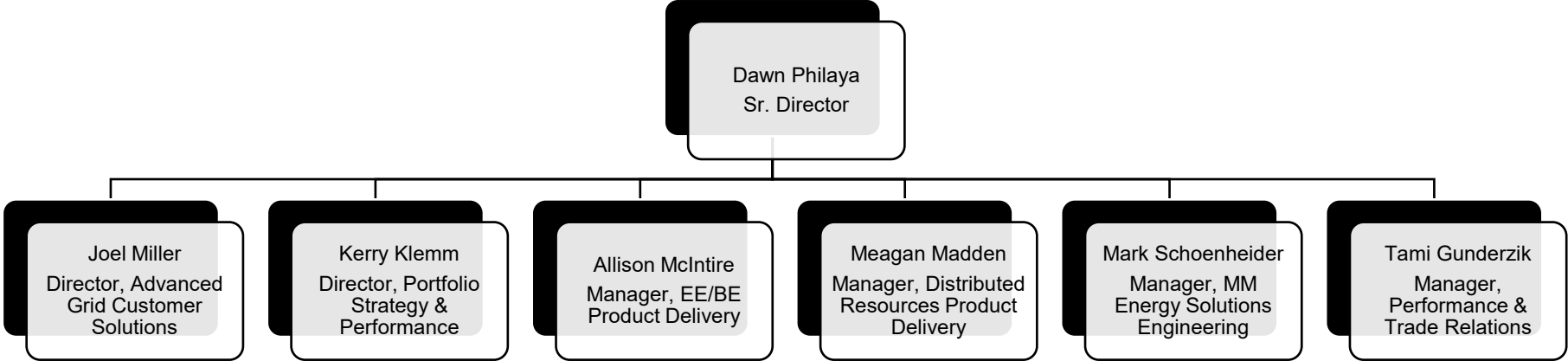


# INTRODUCTION/STAFF REORGANIZATION

Gina Gargano-Amari | DSM Regulatory

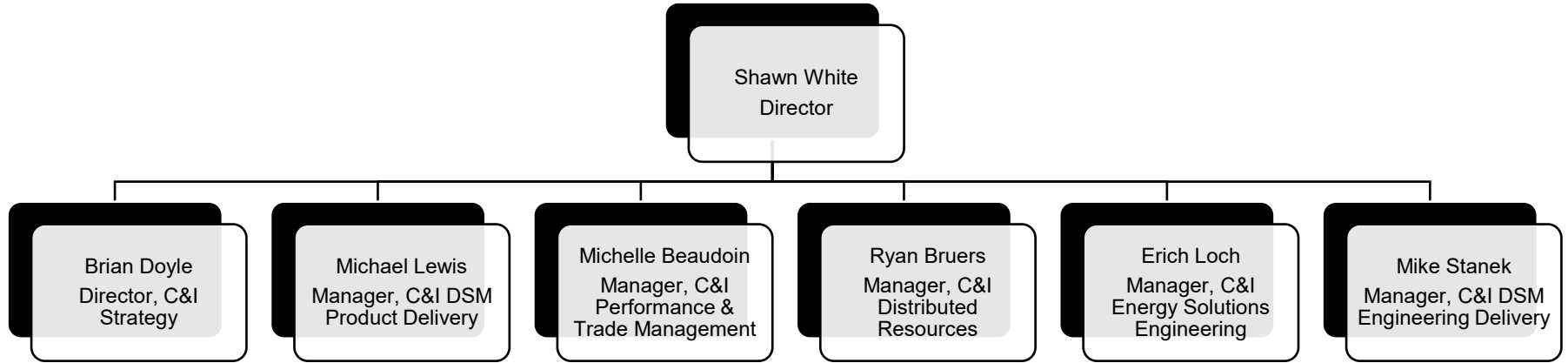


# Introduction – Mass Market Product Management





# Introduction – C&I Product Management





## **DSM ACHIEVEMENT UPDATE**

**Tami Gunderzik | Manager, Performance & Trade Relations**

**Michael Lewis | Manager, C&I EE/BE Product Delivery**

**Robert Macauley | Trade Relations Manager, C&I Customer Solutions**

**Allison McIntire | Manager, MM EE/BE Product Delivery**



# 2024 Q1 Achievement Highlights

## Electric Portfolio

- 244 GWh (55% of 446 GWh Target)
- 46 MW (48% of 96 MW Target)
- \$40MM (44% of \$92MM Budget)

## Business Programs

237 GWh (68% of Target)

- Strategic Energy Management 72 GWh (107%)
- Lighting Efficiency 71 GWh (89%)
- Business Energy Assessments 58 GWh (193%)

## Residential / IQ Programs

- 6.4 GWh (5% of Target)
- Residential Heating & Cooling 2.4 GWh (38%)
- Multifamily Buildings Efficiency 1.2 GWh (19%)

## Gas Portfolio

- 156,066 Net Dth (19% of 817,672 Target)
- \$7.5MM Spend (34% of \$22MM Budget)

## Business Programs

- 31,849 Net Dth (20% of Target)
- New Construction 22,401 Dth (22%)
- Business HVAC+R Systems 6,251 Dth (25%)
- Small Business Solutions 673 Dth (5%)
- Energy Management Systems 68 Dth (1%)

## Residential / IQ Programs

- 124,216 Net Dth (19% of Target)
- Residential Heating & Cooling 94,093 Dth (118%)
- Insulation & Air Sealing 10,098 Dth (17%)
- Home Energy Squad 3,167 Dth (10%)

# Marketing Campaigns & Trade Relations Outreach

## Residential

### Customer Outreach

- IQ – EOC continued text reminders, leave behind energy tips, surveys, and training across programs
- Apogee videos – cross promoted Home Energy Squad, Refrigerator Recycling, Xcel Energy Store, Showerhead kits
- Home Energy Insights – cross promoted Home Energy Squad, Xcel Energy Store, and Whole Home Efficiency
- Home Energy Squad emails – promoting free/reduced cost visits
- March “Spring into Savings” bundled email – promoting energy savings tips, showerheads, AC Rewards and Heat Pump Water Heaters
- CO TOU Transition – series of emails introducing TOU to customers rolling onto the rate in April
- Direct mail – showerhead business reply card, electric rate savings annual mailer
- Onserts – Energy Outreach Colorado, Energy Assistance, Home Lighting, Savers Switch, AC Rewards, AutoPay, Time of Use
- Collateral Updates: New Construction – Energy Star New Home Builder List Info Sheet
- Collateral Update: MFBE – Updated program materials, tenant survey, follow up emails with previous participants

### Trade Ally/Stakeholder Outreach

- New trade ally manager introduction (Salene Chavez)
- Participation/collaboration with CEO, EEBC, City and County of Denver and Boulder, other utilities
- BPI and heat pump workforce development meetings – ongoing
- Boulder Community Advisory Panel Workgroup participation – April 29th
- Spring contractor heat pump training - April 23rd and 24th

### Partners in Energy Co-branded Outreach

- Edgewater – Electric Vehicle Flyer (English & Spanish)
- Salida - Residential Flyer and social media communications
- Windsor - Social media and newsletter content
- Nederland – Business Efficiency Flyer, postcard, social media content
- Adams County – Green team content web and social
- Lake County – Social media content
- Superior – Partners in Energy city website content, newsletter content
- Frisco – Newsletter and social media content
- Northglenn – Residential EV guide
- Arvada – Business assessments flyers



# Commercial Trade Relations Outreach

## Q1 2024

### **Rocky Mountain Mechanical Contractors Association:**

- planning 2024 event sponsorship and newsletter opportunities including commercial heat pump article in Feb newsletter

### **Climate Con Trade Show**

- Tuesday 1/23/24, We were a sponsor and exhibitor.

### **Cooling Midstream Distributor Meetings**

- Q1 2024 Distributor meetings with Energy Solutions
- New DPA and pass through process.

### **Energy Future Collaboration Buildings Workgroup with CCOD**

- Year in review with Climate, Action, Sustainability & Resiliency (CASR) Denver 1/16/24
- Plan for 2024 joint-collaboration

### **LED Midstream Trade Partner Update for 2024**

- Review program results with CLEAResult and 60+ trade participants

### **2024 Energy Efficiency Partner Awards**

- 20 Award winners for 2024.
- Final list is posted on XE website with trade partner website link.
- Planning on-site lunch/meetings in Q2 to present the award.

### **AFCOM State of the Data Center 2024**

- Virtual online seminar 1/31

### **EEBC Quarterly Meeting**

- Thursday 3-14-24

### **Q1 Energy Exchange Newsletter**

- Distribution to 2800 commercial trade partners in March.
- Highlight lighting bonuses through 9-30-24 and Commercial Heat Pump rebates.



# LIGHTING UPDATES

Michael Lewis | Manager, Business Solutions and Results



# Lighting Updates

BONUS REBATE DEADLINE FOR LED GROW LIGHTING EQUIPMENT IS JUNE 15, 2024.

## Additional 50% rebate bonus on LED Grow Lighting Equipment.

- Bonus rebates for LED Grow Lighting Equipment must have an invoice date on or before **June 15, 2024** with an application deadline of **July 31, 2024**.





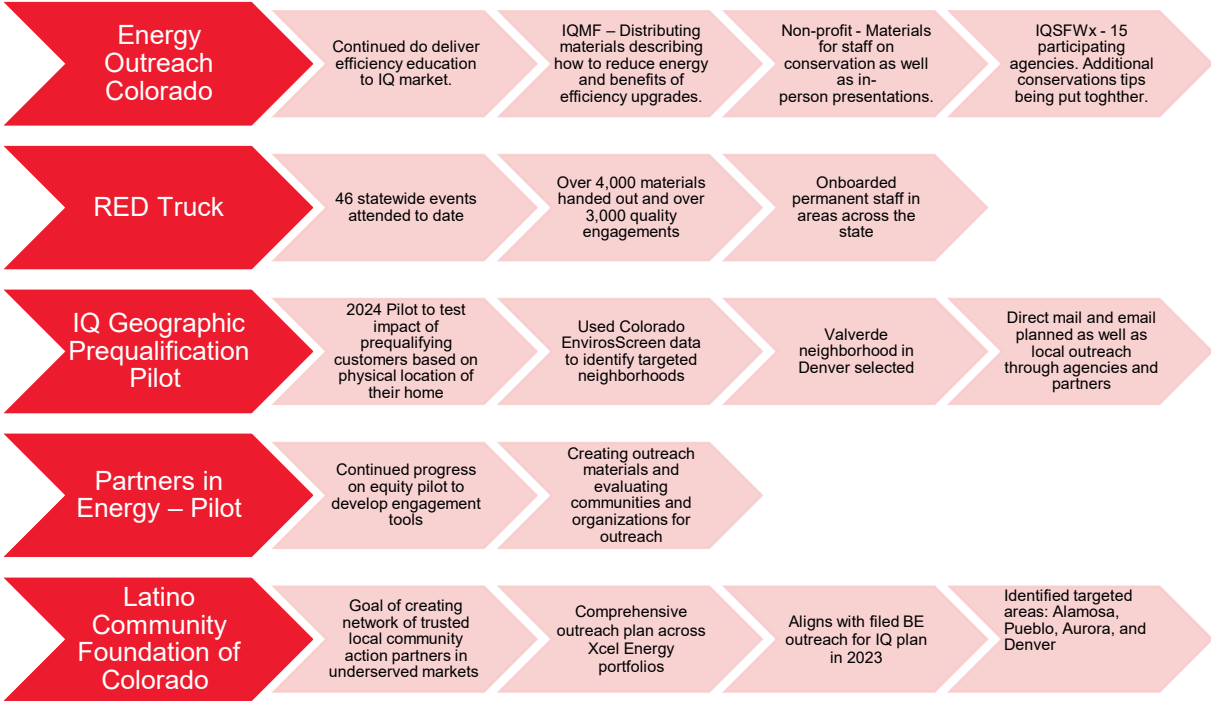
# **IQ/DI OUTREACH AND ENGAGEMENT**

**Ivan Medina | Product Portfolio Manager**





# IQ/DI Outreach and Engagement



## How the RED Truck Works:

Events usually have 1-3 Staffers from PAR or Customer Contact Center who serve as Energy Experts, and a rep from Income Qualified Solar and Social Investments / State Affairs when available.

**Energy Resources** is our 3<sup>rd</sup> party partner for Consumer Education that staffs these events with us



# Outreach Materials

## NEW MEXICO ENERGY ASSISTANCE PROGRAMS 2023

INFORMATION SHEET  
NEW MEXICO



### Low-Income Home Energy Assistance Program (LIHEAP)

#### PROGRAM SUMMARY

LIHEAP assists eligible individuals and families with their heating and cooling expenses. After you submit your application, LIHEAP will schedule an interview within approximately ten days. Your assigned worker will provide you with a list of items that will allow them to determine if you and your household qualify for LIHEAP assistance. Within 45 days, you will receive a letter informing you if you've been approved. If you disagree with the decision, you can request a fair hearing.

Chiefs LIHEAP can assist you quicker if you currently have disconnected utility service, received a disconnection notice or are almost out of wood, propane, or other bulk fuels.

#### ELIGIBILITY

- Households with income at or below 150% of poverty level may qualify.
- Must be for heating or cooling expense.
- Must reside in New Mexico.
- Must be U.S. citizen or qualified immigrant (includes permanent residents, refugees, people granted asylum, victims of human trafficking, etc.)

Household size*	Maximum monthly income
1 person	\$1,823
2 people	\$2,465
3 people	\$3,108
4 people	\$3,750
5 people	\$4,392
6 people	\$5,035
7 people	\$5,678
8 people	\$6,320

Household size only includes people who live with you and who you support financially like a spouse, child, or other dependent family members.\*

#### APPLICATION PERIOD

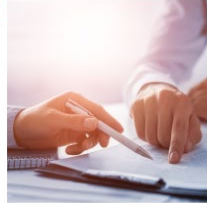
October 1 through September 30

#### CONTACT INFORMATION

Phone: 800-283-4465

Website: [hsd.state.nm.us/lookingforassistance/low\\_income\\_home\\_energy\\_assistance\\_program/](https://hsd.state.nm.us/lookingforassistance/low_income_home_energy_assistance_program/)

If you qualify for LIHEAP you may also qualify for other. Please contact them using the information above.



## NEED HELP PAYING ENERGY BILLS OR WEATHERIZING YOUR HOME?



Si ocupa ayuda pagando su factura ay recursos que pueden ayudar. Contacte al número de teléfono listado por condado de Minnesota Energy Assistance Program.

### Energy Assistance Program.

(If you need help paying your energy bills, there are resources that can help. Contact the Minnesota Energy Assistance Program telephone number listed by your county).

- Minnesota State Energy Assistance office – **800-657-3710** or [mn.gov/commerce](https://mn.gov/commerce) (consumers, consumer assistance, energy assistance, find your provider) may provide additional local assistance.



NEED HELP  
PAYING  
YOUR BILL?



### DON'T WAIT, APPLY NOW

Xcel Energy wants to connect our customers with all the resources available. Thousands of qualified hardworking households have benefited from home energy assistance.

Did you know that state energy assistance programs can offer assistance paying utility bills and the cost for repair or replacement of a home's primary heating system? To learn more about energy assistance programs available in your area, scan the QR Code or visit our website: [xcelenergy.com](https://xcelenergy.com).



Scan the QR code or follow the link above to learn more about energy assistance programs in your area.

For additional questions or assistance on your account, you may also call 800-895-4999.

Si tiene más preguntas o necesita ayuda con su cuenta, también puede llamar al 800-895-4999.

Yog muaj lus nug ntivx los sis xav tau kev pab txog koj tus as khaug. Koj tseem tuaj yeem hu tau 800-895-4999.

Winiw su sala ah ama kaadno dheerard ah ee ku saabsan aqooniyaaga. Waxaad sidoo kale wici kartaa 800-895-4999.



## Outreach Materials



**MA U BAAHAN  
TAHAY  
CAAWIMAAD  
ISKA BIXINTA  
BIILKAAGA?**

**XcelEnergy®**

MINNESOTA

### TSIS TXHOB TOS, CIA LITSO NPE THOV KEV PAB TAM SIM NO

Xcel Energy xav txuas peb cov txheej txheem siv hluav taws xob nrog rau tag nrho cov chaw muab kev pab cuam uas muaj. Ntau txhiab leej neeg ntawm cov yim neeg rau siab ua hauj lwm uas muaj cai tsim nyog twb tau txais txiaj ntsig los ntawm qhov kev pab them nqi hluav taws xob hauv vaj tsev lub.

Koj puas tau paub tias cov txheej txheem pab cuam uas muaj kev pab them nqi hluav taws xob ntawm lub xeev muaj peev xwm muab kev pab them cov nqi hluas taws xob thiab pab them tus nqi rau kev kho los sis kev hloov pauv lab npauv cua sov uas tseem ceeb ntawm lub vaj tsev tib si?


Txhawm rau kawm paub ntau ntxiv txog cov khoos kas pab cuam nqi hluav taws xob thiab nkev uas muaj rau cov neeg nyob hauv Minnesota uas muaj cai tsim nyog, mus saib rau hauv [mn.gov/commerce](http://mn.gov/commerce) thiab tshawb nrhiav "kev pab cuam nqi hluav taws xob thiab nkev" los sis xab kees tus zauv QR.



Yog muaj lus nrog ntxiv los sis xav tau kev pab txog koj tus as khauj. Koj tseem tauv yeem hu tau **800-895-4999**.



Aplicación  
Texas



### Formulario de verificación de necesidades médicas de Texas

**PROPOSITO**  
Es posible que los clientes, o los integrantes del hogar de un cliente, que tengan una afección médica documentada sean elegibles para obtener certificados médicos que permitan a Xcel Energy suspender la desconexión del servicio público durante **63 días**. Durante este periodo, se espera que el cliente logre acuerdos de pago y se le recomienda que busque asistencia en relación con el servicio de energía.

Este formulario se debe completar, lo debe firmar un profesional médico como, por ejemplo, un médico (Medical Doctor, MD), asociado médico (Physician Assistant, PA) o enfermero practicante (Nurse Practitioner, NP), y se debe enviar al servicio público. Xcel Energy suspenderá la acción de corte durante **63 días** y los servicios se restaurarán, cuando corresponda, cuando se logre un acuerdo de pago y haya recibido el Formulario de verificación de necesidades médicas completado y firmado.

**El llenado y la aprobación de este formulario no impide la desconexión por tiempo indefinido.** Es necesario que usted tome medidas para resolver los saldos vencidos a fin de evitar futuras desconexiones.

**INSTRUCCIONES**  
Para solicitar un certificado médico, procure seguir las siguientes instrucciones y completar todo el formulario. Toda la información solicitada en este

Cuentas Personales de Xcel Energy llamando al **800-331-5262**.

Las **secciones I y II** del Formulario de verificación de necesidades médicas las debe completar el titular de la cuenta de Xcel Energy (tal como figura en la última factura del servicio público).

La **sección III** lo debe completar un profesional médico, como, por ejemplo, un médico (MD), asociado médico (PA) o enfermero practicante (NP).

**Un profesional médico debe completar, firmar y enviar este formulario en nombre del cliente.**

Si necesita ayuda para pagar las facturas del servicio público, podemos ayudarlo. Visite [xcelenergy.com/EnergyAssistance](http://xcelenergy.com/EnergyAssistance). Llame al **800-895-4999** para conocer los programas de asistencia energética disponibles en su área.

También puede comunicarse con United Way al **211** para conectarse con organizaciones comunitarias que pueden proporcionar asistencia adicional para el pago de facturas.

### SOLICITUD DE ASISTENCIA PARA EL PAGO DE FACTURAS



DEVOLVER A \_\_\_\_\_

CORREO ELECTRÓNICO \_\_\_\_\_ FAX \_\_\_\_\_ TELÉFONO \_\_\_\_\_

**INFORMACIÓN DEL SOLICITANTE**

NOMBRE LEGAL COMPLETO (PRIMERO, SEGUNDO, APELLIDOS) \_\_\_\_\_

TELÉFONO DE PREFERENCIA \_\_\_\_\_ TELÉFONO ALTERNATIVO \_\_\_\_\_

DIRECCIÓN DE CORREO ELECTRÓNICO \_\_\_\_\_

DIRECCIÓN RESIDENCIAL \_\_\_\_\_ CIUDAD \_\_\_\_\_

ESTADO \_\_\_\_\_ CÓDIGO POSTAL \_\_\_\_\_ CONDADO \_\_\_\_\_

IGUAL QUE ARRIBA

DIRECCIÓN POSTAL \_\_\_\_\_ CIUDAD \_\_\_\_\_

ESTADO \_\_\_\_\_ CÓDIGO POSTAL \_\_\_\_\_

**INFORMACIÓN DEL HOGAR**

INGRESO FAMILIAR ANUAL \$ \_\_\_\_\_ (INCLUIDO EL INGRESO ANUAL DE TODOS EN EL HOGAR)

FECHA DE NACIMIENTO | | | | MM | DD | AAAA

Añote a **todos** los miembros adicionales de su hogar (si corresponde) y sus fechas de nacimiento.

1 NOMBRE _____	FECHA DE NACIMIENTO	4 NOMBRE _____	FECHA DE NACIMIENTO
2 NOMBRE _____	FECHA DE NACIMIENTO	5 NOMBRE _____	FECHA DE NACIMIENTO
3 NOMBRE _____	FECHA DE NACIMIENTO	6 NOMBRE _____	FECHA DE NACIMIENTO

NÚMERO TOTAL DE MIEMBROS DEL HOGAR (INCLUIDO EL SOLICITANTE) \_\_\_\_\_

## Outreach Materials





**MISSION:** *Work hand in hand with our diverse communities to create culturally responsive strategies that build influence, equity and opportunity for all.*

## About the Latino Community Foundation of Colorado (LCFC)



Dynamic state-based organization dedicated to advancing civic, health, economic, and cultural opportunities for Latinos and other marginalized and disproportionately impacted communities.



LCFC envisions a future where all Coloradans can prosper, united in their collective power.



Its mission is to collaborate closely with diverse communities, employing culturally responsive strategies that foster influence, equity, and opportunity for all.



LCFC stands out as a leader in convening, investing in, and cultivating authentic relationships with over 200 BIPOC/LGBTQ+ nonprofits across Colorado.

# Quarter 1 Setting the Foundation

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Focus for quarter one of the Energize Together Pilot Program (ETP) was to onboard new staff/ETP Team and focus on the following:

- **Systems and Processes**
  - Established internal ETP Team weekly systems for operating
  - Hired and onboarded Program Advisors
  - Established internal ETP Team weekly systems for operating
- **Strategy Development/Workplans**
  - Programmatic Developments
  - Co-created with Xcel a Energize Together Program Philosophical Statement
  - Co-created a Evaluation Framework for document and capturing critical data for Public Utilities filings and our internal
  - Developed the Community Action Partner (CAP) role and recruitment process
  - Began the discussion around Hubs (Energy Hubs)
- **Relationship/Trust building**
  - Engaged with Xcel's team through 35 purposeful and intentional 1:1s setting a collaborative tone for this partnership.
  - Engaged and presented at two Xcel stakeholder quarterly meetings (Sept 2023 and March 2024) – this group consists of Xcel program staff, contractors, partners (EOC), city and county agencies (CASR, vendors (Solar/COSSA, Reactivate) environmental justice organizations, associations connected to energy.
- **Acquisition of Knowledge /Data around Energy Sector (RES) /Climate Justice/Environmental**
  - LCFC Team underwent a thorough 3-month comprehensive understanding of Xcel's programs and their customer/community outreach initiatives and efforts, therefore enhancing our insight and operational understanding of each program, access to resources/rebates, barriers and process or enrollment.



# Quarter 2 Pre-Launch Work

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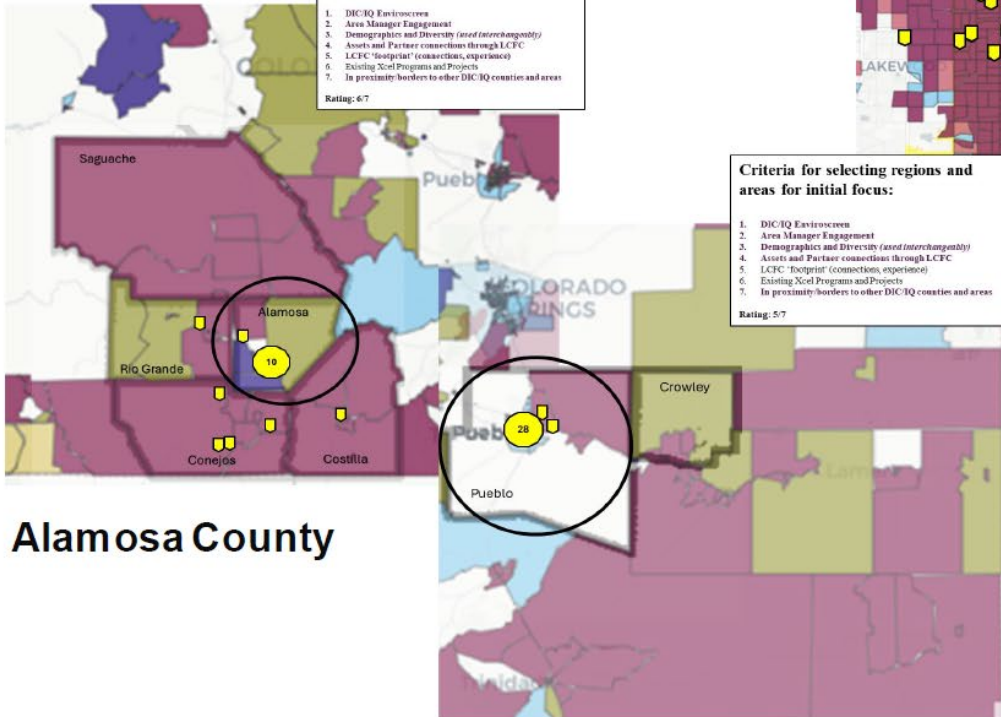
Focus for quarter two of the Energize Together Pilot Program (ETP) is to onboard Community Action Partners (CAPs) and focus on the following:

- **Execution of Workplans**
  - Execute a grass bottom recruitment strategy/hire Community Action Partners.
  - Continue with discovery and development of identifying ecosystem non-profits (NPs), community leaders and other connections and resources to support Community Action Partners (CAPs) and Hubs
- **Development of CAP Training**
  - Co-create with Xcel and Program Advisors
- **Create the messaging for Energize Together Program**
  - Co-create with Xcel and Program Advisors
- **Continued Acquisition of Learning**
  - Meet with Environmental Justice groups that were part of the settlement
  - Participating in Public Utilities Commission meetings supporting their development of an equity framework
- **Systems & Processes**
  - Onboard Iffie Jennings into ETP
  - Co-create and implement an Evaluation Framework for documenting and capturing critical data for Public Utilities filings
- **Relationship/Trust building**
  - Continue relationship building with Xcel partners such as Energy Outreach Colorado and other stakeholder groups such as Environmental Justice organizations and other city/state agencies

# Regional Areas

## Criteria for selecting regions and areas for initial focus:

1. DIC/IQ Enviroscreen
  2. Area Manager Engagement
  3. Demographics and Diversity (*used interchangeably*)
  4. Assets and Partner connections through LCFC
  5. LCFC 'footprint' (connections, experience)
  6. Existing Xcel Programs and Projects
  7. In proximity/borders to other DIC/IQ counties and areas
- Rating: 6/7

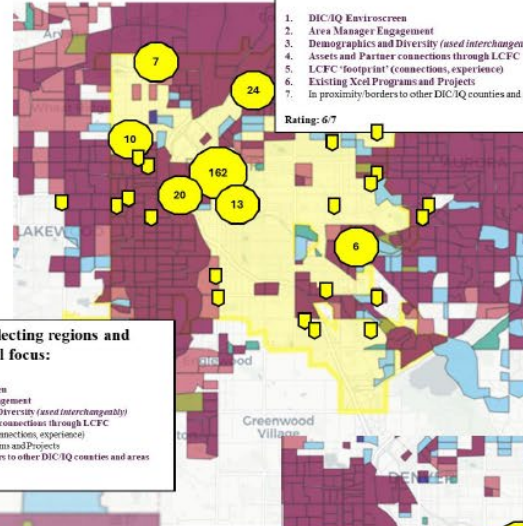


Alamosa County

# City of Aurora

## Criteria for selecting regions and areas for initial focus:

1. DIC/IQ Enviroscreen
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  3. Demographics and Diversity (*used interchangeably*)
  4. Assets and Partner connections through LCFC
  5. LCFC 'footprint' (connections, experience)
  6. Existing Xcel Programs and Projects
  7. In proximity/borders to other DIC/IQ counties and areas
- Rating: 6/7



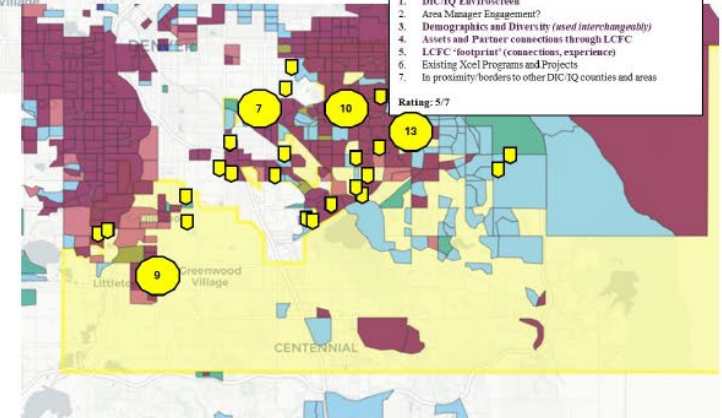
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  6. Existing Xcel Programs and Projects
  7. In proximity/borders to other DIC/IQ counties and areas
- Rating: 5/7

# Denver County

## Criteria for selecting regions and areas for initial focus:

1. DIC/IQ Enviroscreen
  2. Area Manager Engagement
  3. Demographics and Diversity (*used interchangeably*)
  4. Assets and Partner connections through LCFC
  5. LCFC 'footprint' (connections, experience)
  6. Existing Xcel Programs and Projects
  7. In proximity/borders to other DIC/IQ counties and areas
- Rating: 5/7



Pueblo County

# Single-Family Weatherization Product

## 2023 Arrears Numbers

- Compliance item from the Settlement Agreement in Proceeding No. 20A-0287EG
- In 2023, Public Service had 1,026 customers who had been in arrears at least once during the year participated in the Single-Family Weatherization product.



# RFP UPDATE

Jae Chong | Manager, Strategic SC Sourcing



# Q1 2024 – RFP Update

- CO – DR New Products Program



# NATURAL GAS DEMAND RESPONSE RFP UPDATE

Stephen Mullaly | Product Developer

# Natural Gas Demand Response RFP Update

- RFI completed seeking new Demand Response ideas in Q3 of 2023
- Issued RFP that targeted Natural Gas Demand Response
- Received four submissions for the RFP
- Selected a Residential Behavioral Demand Response program after scoring the responses
- Vendor has been notified and we are working on a contract
  - Targeting 2024-2025 heating season



# **VIRTUAL POWER PLANT RFP UPDATE**

**Ryan Bruers | Manager, Demand Management**



# VPP RFP Update

- Use Cases, Functional Requirements, and Non-Functional Requirements Complete
- Phase 1 identified (Renewable Battery Connect)
- Vendor list identified
- RFP Published April 30th, 2024
- Vendor responses due back May 21st, 2024
- Vendor scoring and selection scheduled to be completed by June 28th, 2024
- Contract review and approval scheduled for July 31st, 2024



TIME FOR A BREAK





# DSM Regulatory Contacts

Gina Gargano-Amari

Case Specialist II

[gina.l.gargano-amari@xcelenergy.com](mailto:gina.l.gargano-amari@xcelenergy.com)

Melanie Castro

Regulatory Administrator

[melanie.d.castro@xcelenergy.com](mailto:melanie.d.castro@xcelenergy.com)

