

1. Accenture
2. Advanced Energy
3. Alectra Utilities
4. Ally Energy Solutions
5. Alternative Energy Systems Consulting
6. Ameren
7. American Public Power Association
8. Apex Analytics
9. Apogee Interactive
10. Applied Energy Group
11. APTIM
12. Aquanta
13. Arizona Public Service
14. Armada Power
15. Austin Energy
16. Baltimore Gas and Electric
17. Berkshire Hathaway Energy
18. Black & Veatch Management Consulting
19. Bonneville Power Administration
20. Bristol Tennessee Essential Services
21. Buffalo Niagara Medical Campus
22. Cadmus
23. Calico Energy
24. Central Hudson Gas & Electric
25. Chelan PUD
26. City of Tallahassee Utilities
27. Clean Power Research
28. CLEAResult
29. COI Energy Services
30. Colbun
31. Commonwealth Edison
32. Con Edison
33. Connected Energy
34. Connected Energy Limited
35. Consumers Energy Company
36. Contract Callers
37. CPower Energy Management
38. CPS Energy
39. Customized Energy Solutions
40. Dairyland Power Cooperative
41. DTE Energy
42. Duke Energy
43. E Source
44. E4TheFuture
45. Eaton
46. ecobee
47. Edison Electric Institute
48. Efficiency Vermont
49. Elocity
50. Emerson Commercial & Residential Solutions
51. EMI Consulting
52. Enbala
53. Encycle
54. Enel X
55. Energy Federation
56. Energy Solutions
57. EnergyHub
58. EnerVision
59. Entergy
60. EPRI
61. ERS
62. Evergy
63. Eversource
64. Extensible Energy
65. FirstEnergy
66. FleetCarma
67. FPL
68. Franklin Energy
69. GDS Associates
70. Generac
71. Georgia Power Company
72. Google (Nest)
73. Great River Energy
74. GridFabric
75. GridOptimize
76. GridPoint
77. Guidehouse
78. Hawaiian Electric Company
79. High West Energy
80. Honeywell Smart Energy
81. ICF
82. Idaho Power
83. IGS Energy
84. Illume Advising
85. Indianapolis Power & Light Co.
86. Integral Analytics
87. IPKeys Power Partners
88. Itron
89. Jackson EMC
90. Landis+Gyr
91. Leap
92. Modesto Irrigation District
93. National Grid
94. National Rural Electric Cooperative
95. NB Power
96. New Braunfels Utilities
97. New Hampshire Electric Cooperative
98. New York Power Authority
99. Nexant
100. North Carolina Electric Membership Corporation
101. NTC
102. OATI
103. Oklahoma Gas & Electric
104. Olivine
105. Oncor Electric Delivery
106. Open Systems International
107. OpenADR Alliance
108. Opinion Dynamics
109. Opus One
110. Oracle Utilities
111. Orange and Rockland Utilities
112. Pacific Gas & Electric
113. PECO, An Exelon Company
114. Pepco, an Exelon Company
115. Portland General Electric
116. Powerley
117. PPL Electric Utilities
118. Public Service Company of Oklahoma
119. Rappahannock Electric Cooperative
120. Resideo
121. RF Demand Solutions
122. Sacramento Municipal Utility District
123. Salt River Project
124. San Diego Gas & Electric
125. Santee Cooper
126. Schneider Electric
127. Scope Services
128. ScottMadden
129. Seattle City Light
130. Shifted Energy
131. Skipping Stone
132. Smart Electric Power Alliance
133. Smartenit
134. Snohomish County PUD
135. Southern California Edison
136. Southern California Gas Company
137. Steffes
138. St. John Energy
139. Sunverge Energy
140. Tantalus
141. Tennessee Municipal Electric Power Association
142. Tennessee Valley Authority
143. Tetra Tech
144. The Brattle Group
145. Threshold
146. Tierra Resource Consultants
147. TRC
148. Tri-State Generation & Transmission
149. Trickle Star
150. TROVE
151. Tucson Electric Power
152. Uplight
153. Utility Load Management Exchange
154. Vectren
155. Warranty Design
156. Waseda University
157. West Monroe Partners
158. Xcel Energy
159. Zen Ecosystems
160. Zeuthen Management Solutions



PLMA Load Management Dialogue

COVID-19 Impacts on Utility Loads and Implications for Load Management Programs



Rich Philip
PLMA



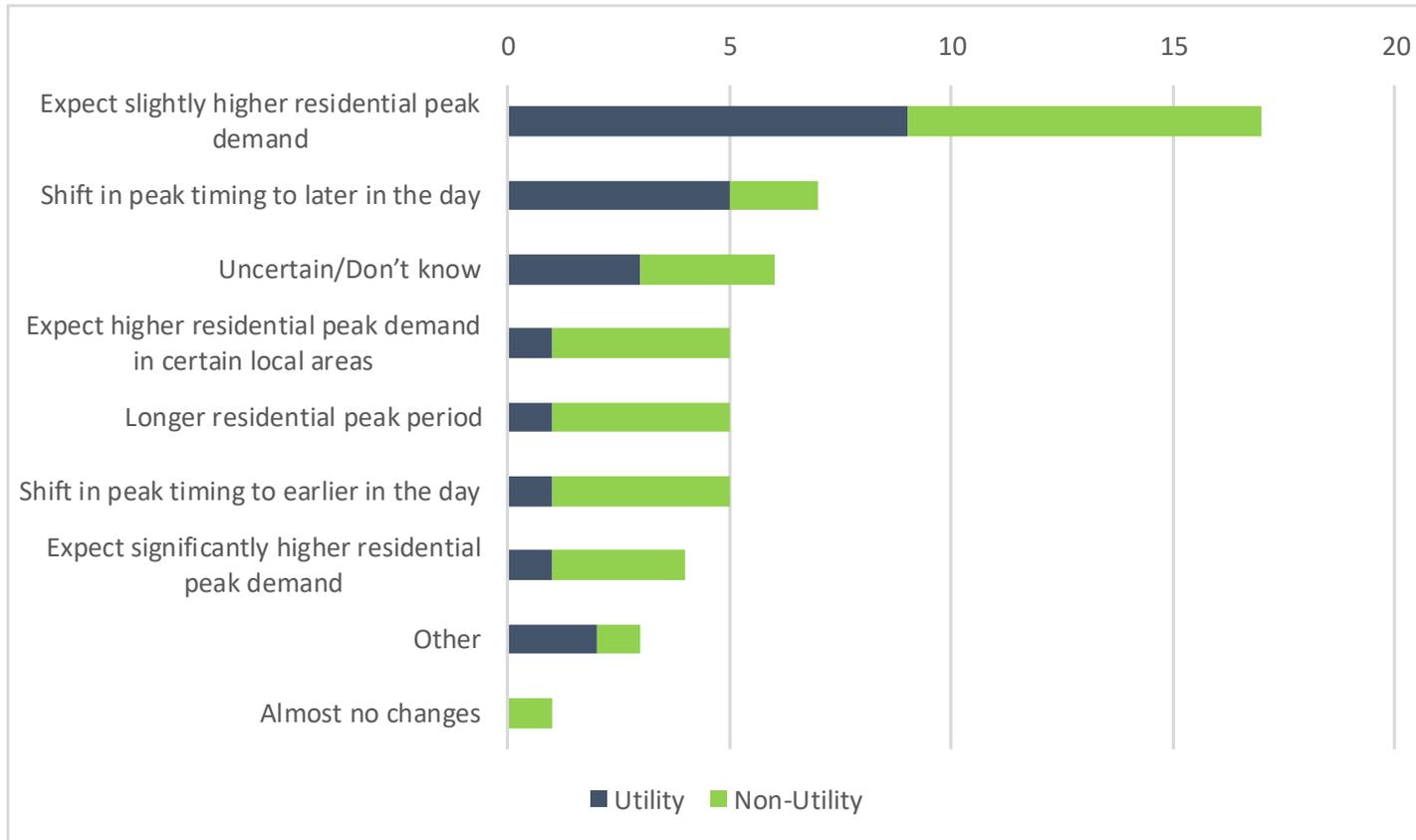
Debyani Ghosh
Guidehouse



Brett Feldman
Guidehouse
& PLMA Award Cochair

COVID-19 Impact Survey: Question 2

For residential peak load changes due to COVID-19, which of the following apply? Please select all that apply.

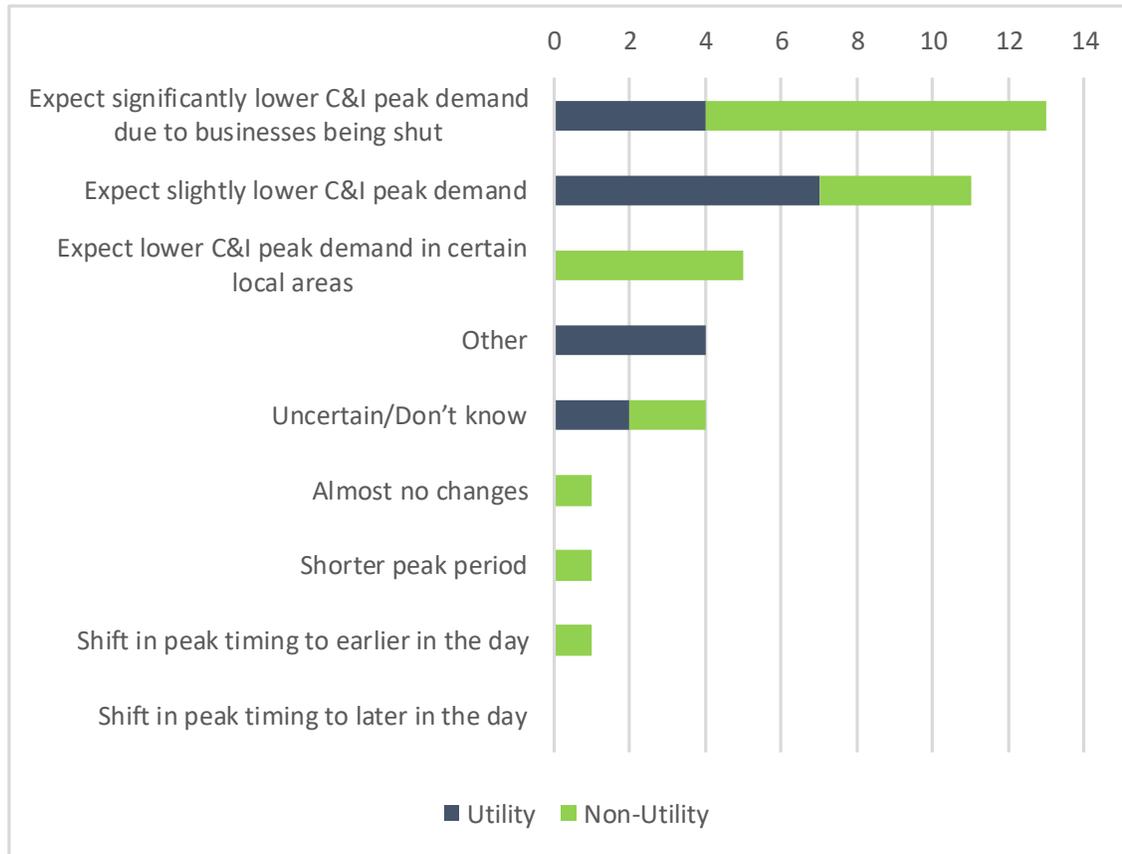


- Overall peak demand is expected to drop; however, many respondents expect that **residential peak demand will be slightly higher this summer.**
- Survey respondents indicate that a **shift in residential peak demand times may take place**, with utilities expecting peak to occur later in the day.
 - Non-utility respondents more often indicated that the shift may lead to earlier peak demand times.
- One utility respondent noted varying residential customer demographics will result in differences in load change patterns across service territory.



COVID-19 Impact Survey: Question 3

For C&I peak load changes due to COVID-19, which of the following apply? Please select all that apply.

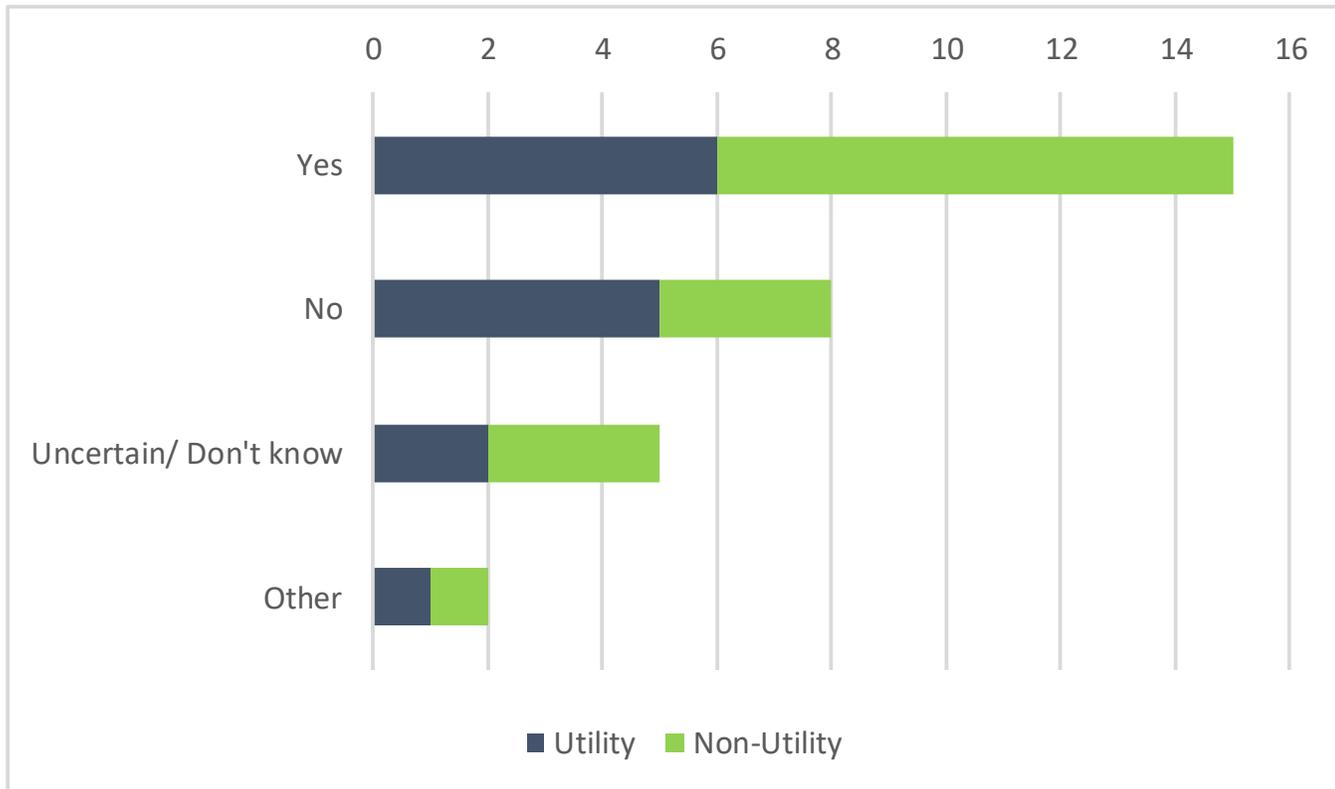


- DR practitioners generally predict significant reductions in C&I peak demand, where **utilities tend to expect only slightly lower C&I peak demand.**
- Respondents **feel less strongly about the duration and shift in peak demand times** for the C&I segment than for Residential, with only some DR practitioners reporting likely changes here.
- One survey respondent notes that **C&I peak demand is sector dependent**, with fewer changes to manufacturing than sectors like education and retail.



COVID-19 Impact Survey: Question 4a

Has your utility, or utilities that you are working with, planned changes to existing DR programs (including pilots) for the upcoming summer season in response to COVID-19?

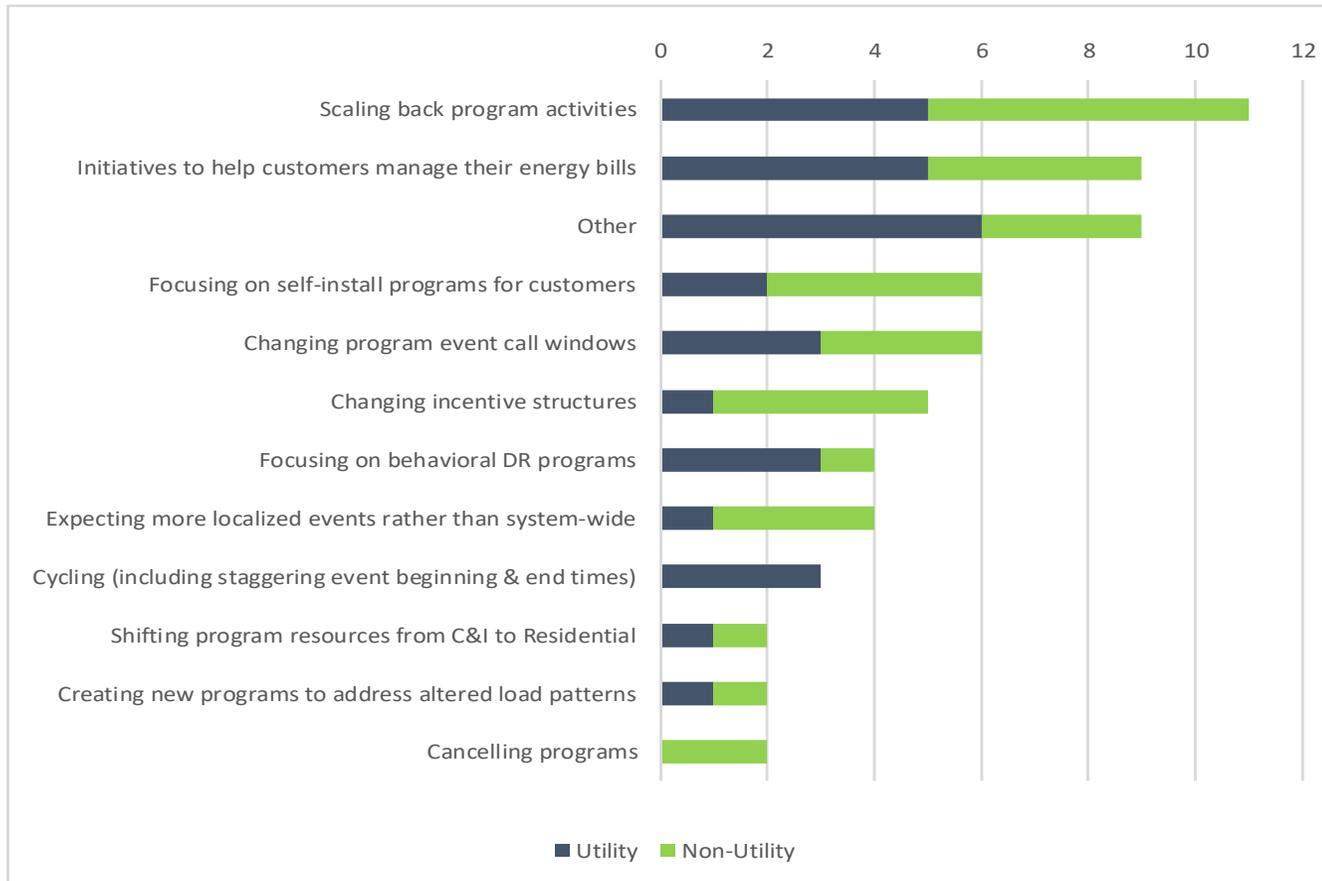


- **Some utilities have planned changes to DR programs in response to the effects of COVID-19.**
- **A DR practitioner stated that program features may not change, but that utilities are prepared for changes in the level of load secured through DR.**



COVID-19 Impact Survey: Question 4c

Which of the changes below is your utility, or utilities you work with, planning? Please select all that apply.

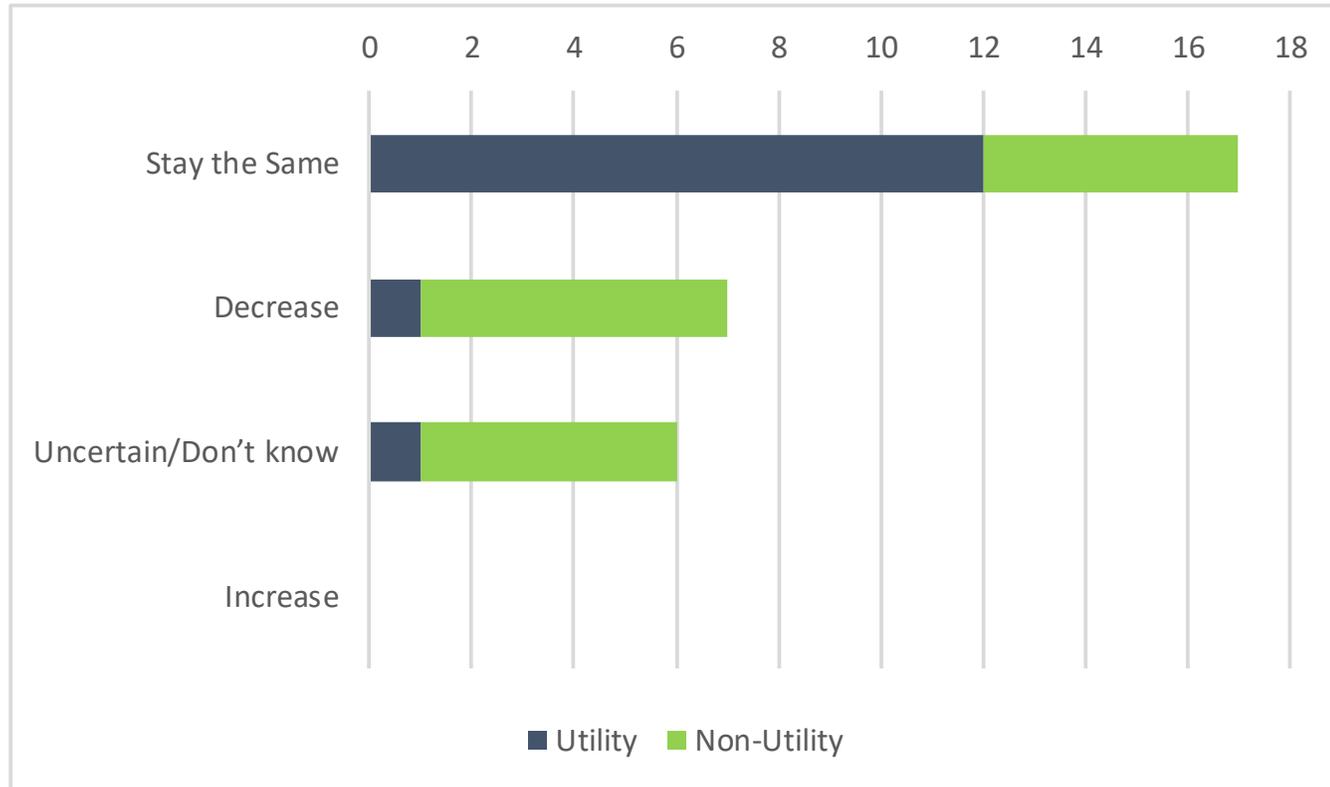


- **There is no clear consensus on the manners in which utility DR programs will change as a result of COVID-19**
 - Scaling back of program activities received the most responses
- Generally, **utilities' and DR practitioners' responses align with regard to how program features may change.**
 - However, non-utility respondents appear to expect a greater range of changes than utility respondents
- **Other possible changes** reported include:
 - Reductions in marketing activities
 - Remote site verification
 - Remote application review & approval



COVID-19 Impact Survey: Question 5

Based on COVID-19, do you expect your summer DR budget to:

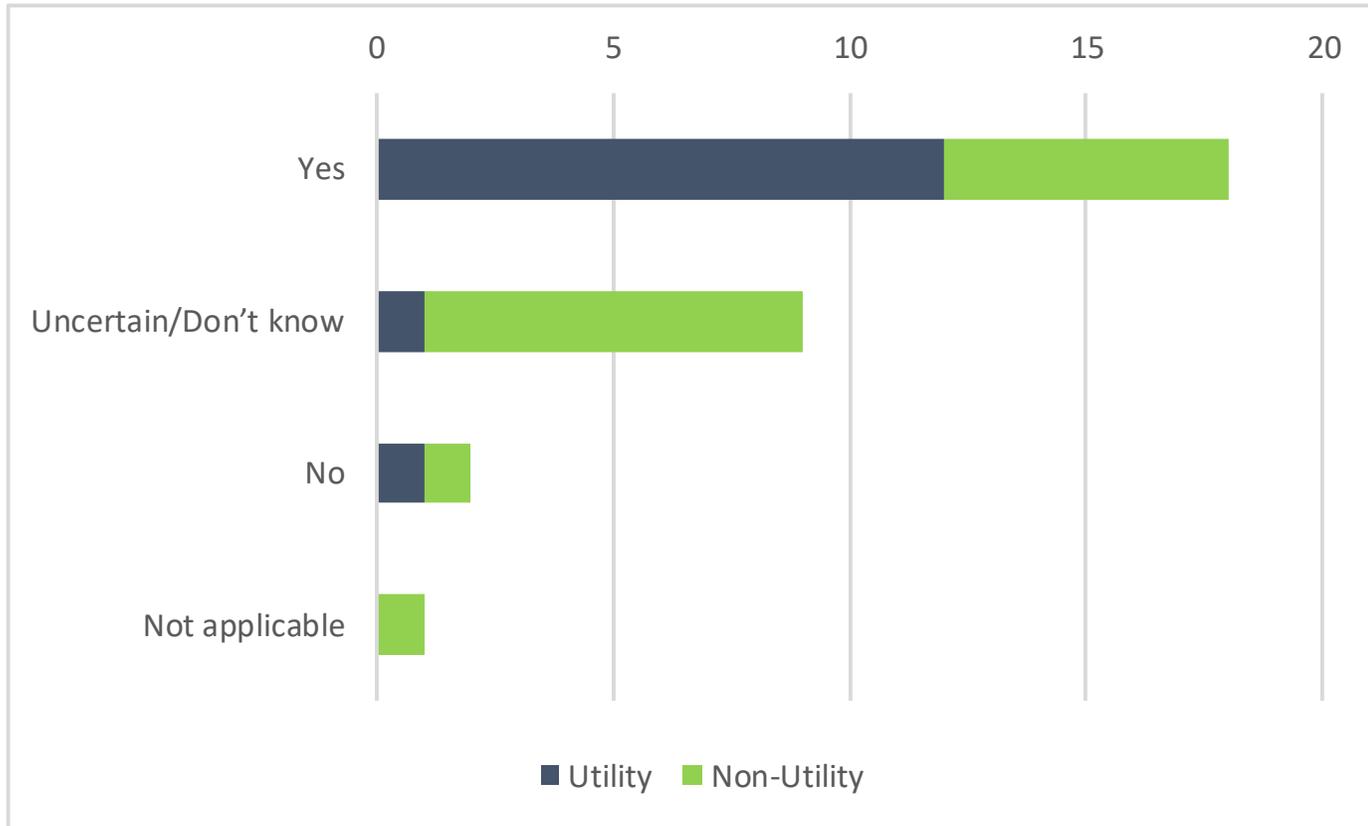


- **Many respondents noted that utility summer DR budgets will stay the same.**
 - One utility respondent noted that budgets for the year were set prior to COVID-19, but how much of the budget will be spent is the unknown.
- Another respondent noted that **utility budgets are down across the board**, and not just for DR programs.
- **No increases to budgets, even for residential programs, are expected.**



COVID-19 Impact Survey: Question 6

Are you concerned about more residential DR event overrides and opt outs due to people working from home?

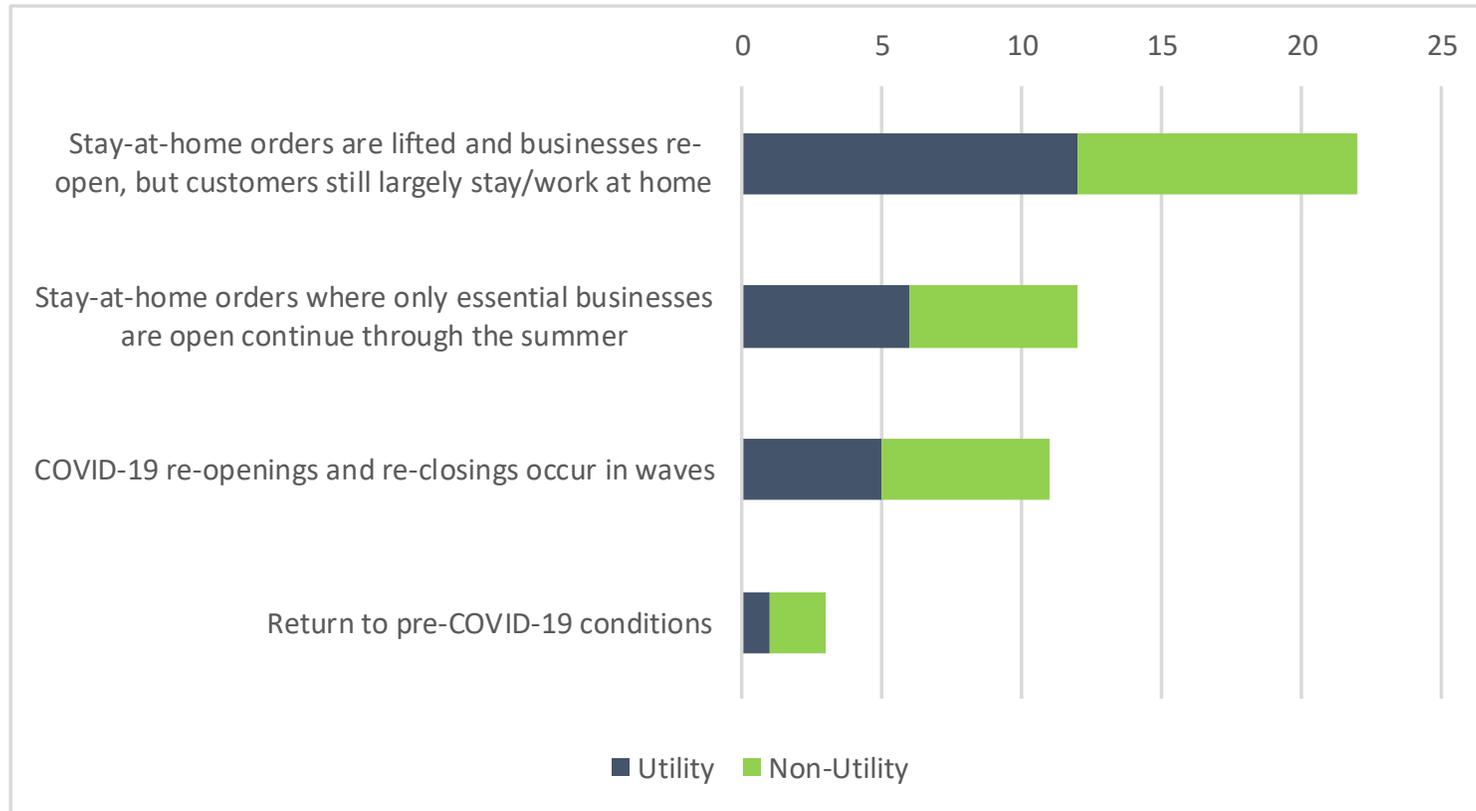


- The **majority of utilities are concerned that residential DR overrides and opt outs will prove a challenge** this summer.
 - Non-utility DR practitioners largely agree or are uncertain about the effects.
- One respondent noted that residential peaks may be lengthened causing the **utility programs to run T-stat programs for longer periods of time and later into the evening.**



COVID-19 Impact Survey: Question 7b

Which of the following scenarios is your utility, or are utilities you work with, planning for this summer? Please select all that apply.



- The majority of respondents engaged in scenario planning **believe that utility customers will continue to work at home, regardless of whether a stay at home order is lifted.**
- **Few respondents are engaged in scenario planning that accounts for waves of re-opening & re-closing in response to the virus.**
- One utility, and only two DR practitioners, are planning for a return to “business as usual” during summer 2020.



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Upcoming PLMA Webcasts

- June 18** Connected Energy (UK) Ltd for Battery Recycling in Belgium
- July 9** Austin Energy for Austin SHINES Project
- July 16** CPS Energy for Public Engagement
- Aug. 13** City of New York, Dept of Citywide Admin Services for Building Operator Engagement

