a. Document outline – Who is the audience? (policy makers, industrial customers, etc.?) FOE, PSC, etc.
    i. SEM definition (look at how FOE is defining SEM [be aware of the language surrounding large-industry and introduce some flexibility or explain how the efforts are to date])
        1. What is the desired outcome of this effort?
        2. Why are we talking about SEM?
            a. Reference the barriers to IEE projects
    ii. Status of SEM in WI
        1. FOE/SEM program
            a. FOE SEM fundamentals training (broader audience of industrial and commercial businesses)
            b. Hospitals and other institutions might be the next step
            c. Cohorts are the current effort with SEM
                i. Customer groups discussing energy-related issues
            d. Energy Teams
                i. Some utility reps are on 'energy teams'
                ii. WE Energies metering incentive program (trying to get customers to engage in sub-metering)?
        2. WMEP/PSI (profitable sustainability initiative) – small- and medium-sized manufacturers
        3. Sustain Dane
        4. UW-Milwaukee
        5. SEO/Energy Independent Communities
        6. WECC
        7. 7th Wave
    iii. Barriers to SEM
        1. Differences between Small, medium, and large industrial customers, commercial customers, and institutional customers like hospitals and universities (they have very different competition variables, may affect bringing cohorts together)
            a. Larger customers, for ex, have more dedicated energy staff, but there may not be a meeting necessary for the smaller customers
        2. Market barriers
            a. Time constraints
            b. Consulting firms and other suppliers for SEM (as it is important to being market-driven)
            c. How do we make money while engaging in SEM?
            d. Consistency within the SEM approach
            e. Awareness of the benefits of SEM, outreach about the benefits of SEM, producing examples for similar industrial projects (how much $ are we saving?!)
        3. Getting SEM in place as a program to address IEE project implementation barriers
            a. Because SEM requires a cross-functional effort within the org, energy use within their core biz/process can be addressed more effectively (especially on the process side) In other words, customers are unaware of certain energy-related opportunities, particularly on the process side. Consultants

or suppliers can easily ID issues with lighting and HVAC, but process-specific opportunities are little more elusive. Cohorts could be a way to address finding more process-/site-specific energy opportunities (3rd item under unaware of opportunities) (FAB may be an example of a group to speak with about a pilot as to how to go about IDing and implementing IEE projects) (could be a foot in the door for trying SEM and other efforts on small and medium-sized companies – Cate Rahmlow)

   b. Timing for projects
   c. Low management priority (SEM keeps this a higher priority, or at least it should)
   d. High technical risk
   e. High financial risk

4. Time constraints and detailed but straightforward ways in which SEM should be implemented

iv. What are the suggestions for solutions/recommendations
   1. To develop a process to train businesses on SEM
   2. Develop a mentoring program for SEM trainees
   3. Tools to help customers manage the effort (software or other resource for IDing opportunities/monitoring operations)
   4. Establishing a recognition program for successful SEM efforts (motivator, competition, leading by example)
   5. Providing incentives for IEE projects (also for successful completion), help with staff time
   6. Providing incentives to assess energy management information systems (EMIS)
   7. Provide incentives to save energy through operational changes
   8. Provide incentives to put in monitoring/submetering in facilities (behavior management)
   9. Supply chain cohorts (getting the supply chain to emulate your sustainability practices)
   10. More significant engagement from upper management (CEOs and CFOs may have a commitment to energy-related issues, for example)
   11. State-level incentives, tax-credits, mandates for IEE implementation
   12. Develop a model and training for SEM suppliers
   13. Develop a service for an SEM gap analysis to give a sense of where a –customer is for energy related opportunities

v. Of those solutions, what are the highest priority recommendations?
   1. Who will tasked with the responsibility?
   2. How long will this take? 1-3 years?
   3. What resources are necessary for this effort? To be brought to bear on what, specifically?