

# Connecting Climate Change, Smart Grid, and Consumer Attitudes Workshop

## Panel 1: Segmentation and Personalization



**Judith Schwartz**

**To the Point**

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**Judith Schwartz** is a nationally recognized expert in consumer engagement, smart grid communications, dynamic pricing and energy literacy programs. Her company, To the Point is a strategic marketing and systems consultancy working on the leading edge of human-centered design, communication and marketing programs, systems analysis, and applied technology since 1987. Since 2007, Judith has been on the forefront of sustainability issues, the Smart Grid, alternative energy, and the digital home. Working at the nexus of public policy, technology, communications, and business; she brings an unusual perspective that crosses functional disciplines to cut to the heart of the problems and solutions.

To the Point builds viral stakeholder education programs and advises utilities and technology companies targeting diverse audiences. Judith served as the Strategic Communications Consultant to the National Action Plan for Demand Response Coalition of Coalitions. She was a member of the leadership team for the Department of Energy Smart Grid Consumer Engagement Working Group and the CPUC Technical Working Group on Smart Grid Goals, identifying best practices in customer and stakeholder outreach. She was program manager for the IEEE PES Community Summit Program, and has written or co-authored publications for the Smart Grid Consumer Collaborative, Association for Demand Response and Smart Grid, National Action Plan on DR, the Institute for Electric Efficiency, and DEFG. She is a graduate of the Cornell University School of Architecture, Art, and Planning. Judith is currently a board member of ADS and Family & Children Services of Silicon Valley.



**Jennie Stephens**

**University of Vermont**

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**Jennie C. Stephens** is the Blittersdorf Professor of Sustainability Science and Policy at the University of Vermont's Rubenstein School of Environment and Natural Resources and the College of Engineering and Mathematical Sciences. Professor Stephens' research, teaching, and community engagement focus on socio-political aspects of energy technology innovation, electricity system change, climate change communication, and facilitating social learning in the transition from fossil fuel to renewables based energy systems.

Jennie has contributed to understanding the social dynamics of wind power, carbon capture and storage, and smart grid, and brings experience in stakeholder engagement and communication among experts, practitioners, academics, and the public. Professor Stephens was previously on the faculty at Clark University (2005-2014), and she did post-doctoral research at Harvard's Kennedy School (2002-2005). She earned her PhD (2002) at Caltech in Environmental Science and Engineering and her BA (1997) at Harvard in Environmental Science and Public Policy.

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**David Weitz** is Director, Applied Building Science Strategy and Product Development for Conservation Services Group. He provides leadership on building science issues as they relate to CSG's programs and the development or incorporation of new techniques, services and technologies. ABS develops and establishes technical standards; defines QA/QC processes and inspection protocols; assists with both internal and external building science training; and oversees technical development and technology acquisition and development. ABS also provides technical support for CSG's delivery programs.

In the past, David has served as the Project Manager of CSG's New Construction Division. He has also held numerous other positions involving building regulations and standards for energy efficiency. He was Energy Code Coordinator for the Massachusetts Board of Building Regulations when the state adopted their new codes in the late 1990s, and then served as Executive Director of the Building Codes Assistance Project, which advocates for energy code adoption throughout the US. He served three terms as a member of the International Energy Conservation Code Committee, spent seven years on the ASHRAE 90.1 committee, and was chairman of the Building Performance Institute's Standards Management Board.



**Jamie Wimberly**  
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**Jamie Wimberly** has been serving as CEO of the Distributed Energy Financial Group LLC (DEFG) since it was founded in 2003. With more than 20 years of experience in energy, Jamie has interacted with leading technology innovators in the space, executive teams at major independently owned utilities and energy retailers, thought leaders and regulators. His expertise includes general management and operational consulting, and more specifically customer engagement and strategy, program and offering design, marketing and communications, and customer service.

Firmly believing customers are the future of energy, Jamie and the DEFG team serve as catalysts for this change, helping clients better connect with customers.

Prior to founding DEFG, Jamie co-founded and served as President of the Center for the Advancement of Energy Markets (CAEM), a non-profit think tank focused on the energy sector. He served as the Vice President of the Consumer Energy Council of America (CECA), the oldest public interest organization in the nation focusing on energy, telecommunications and other network industries providing essential services to consumers.

### Panel 2: What Varied Customer Perspectives Mean for Communications, Education, and Outreach



**David Dobratz**  
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**David Dobratz**, P.E., CEM, BSME, MBA is the Supervisor of Direct Install and Load Management for the Energy Efficiency Department of **Northeast Utilities** and is a key resource on Demand Response industry developments, market integration of Demand Resources, automation of demand response and Smart Grid technologies.

David has more than 20 years of experience in engineering, energy industry project management, energy efficiency program implementation as well as Load Response Program Administration. He has proven expertise in leading project teams and organizing the implementation of complex project activities. Mr. Dobratz is a Licensed Professional Engineer, a Certified Energy Manager and has a baccalaureate degree in Mechanical Engineering and a Master's Degree in Business Management.



**Seth Kiner**  
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**Seth Kiner** is a trailblazer of the customer-centric and profitable smarter energy lifestyle. Seth is known for building one of the largest conservation portfolios in North America. He is passionate about building the practice of *Intelligent Sustainability*. This passion is carried through both his professional work and personal life. As Founder & Managing Principal of Charlotte Street Advisors, he comfortably sits in the middle of disruption, social change and technology and helps clients transform market models and drive sustainable growth.

Most recently, Seth served as Vice President, Customer Programs & Services at Southern California Edison, where he applied his marketing and consumer behavior expertise to connect technology, data, and the consumer. Seth spearheaded efforts designed to help businesses and homeowners adopt a smarter energy lifestyle, with a focus on emerging clean technologies. Kiner had oversight for the company's energy efficiency, demand response, and clean self-generation program portfolios. Additionally, Seth led customer experience, marketing, e-commerce, new product development as well as strategic alliances functions. Seth was responsible for building customer engagement, refining customer service models and achieving key business and product objectives. He pioneered the successful customer-centric introduction of smart meters to the company's 5 million customers. Seth is credited for transforming the go-to-market approach through the data-driven "next-best-offer" strategy that increased adoption and reduced costs.

Kiner currently serves on the board of directors for TreePeople and the China-US Energy Efficiency Alliance. Seth is also currently an "Affiliated Expert" with the Alliance To Save Energy.

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**Dave Kolata**  
**Citizens Utility Board**  
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**David Kolata** is the Executive Director of the Citizens Utility Board, an organization recently called the “gold standard of consumer groups nationwide” by the St. Louis *Post-Dispatch*. He started at CUB in 2001 as a senior policy analyst, moving to director of policy and government affairs in 2003. He was named Executive Director in September 2005. Under Kolata’s leadership, CUB has become a national leader on using technology to help achieve consumer benefits, with a particular emphasis on an online strategy that takes root at the local community level. CUB is also one of the leading consumer experts in the country on smart grid issues.

Prior to joining CUB, he was a policy analyst for the Environmental Law & Policy Center, where he focused on transportation and energy issues. David is a 1991 graduate of the University of Notre Dame. He received a master’s degree in political science from the University of Toronto in 1993, and a Ph.D. in the same subject from Vanderbilt University in 2003. He is a board member of the Illinois Environmental Council and was named to Crain’s Top 40 under 40 list in 2006.



**Joe Laquatra**  
**Cornell University**  
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**Joseph Laquatra**, Ph.D. is a professor in the Department of Design and Environmental Analysis at Cornell University. He focuses his teaching and research efforts on sustainable aspects of housing with emphases on residential energy efficiency and indoor environmental quality. As an Extension Housing Specialist, Joe develops and implements educational programs on these and other topics through the statewide network of Cornell University Cooperative Extension. He has conducted educational programs for homebuilders in partnership with the National Association of Home Builders (NAHB). He has also taught builders, engineers, architects, and government officials in Poland, Russia, and Japan. Joe is a past President of the Housing Education and Research Association and served two terms as Chair of the National Consortium of Housing Research Centers. He is listed in *Who’s Who Among American Teachers and Educators*, *Who’s Who in America*, and *Who’s Who in the World*.



**Jill Vohr**  
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**Jill Vohr**, Marketing/Communications Manager for ENERGY STAR at the U.S. Environmental Protection Agency (EPA), has more than 20 years of Environmental Marketing experience. Starting with her MBA in Marketing from New York University’s Stern Graduate School of Business, her various environmental marketing projects have spanned everything from recycling education for the New York Department of Sanitation to providing consulting services to a wide variety of Federal and State environmental programs focused on issues such as sustainability, hazardous waste/source reduction, green development, green buildings, environmentally preferable products, transportation, green power and, of course, energy efficiency. Since joining EPA in 2000, in addition to providing overall marketing support to ENERGY STAR, Jill has acted as the EPA liaison to retailers of ENERGY STAR products, thus facilitating mutually beneficial marketing programs with top national retailers, such as Amazon, Best Buy, The Home Depot, Sears, and Wal-Mart. In her current position as the Director of Consumer Marketing for ENERGY STAR Products, Jill works with a valued team to engage consumers in energy efficiency with an emphasis on products and behaviors in the home. She encourages all of you to join EPA in saving energy and reducing climate change by taking the ENERGY STAR Pledge at [energystar.gov/changetheworld](http://energystar.gov/changetheworld).



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### Panel 3: Solutions for Applying Segmentation to Targeted Communications



**Anthony Barnes**  
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**Tony Barnes**, Senior Director of Client Solutions, leads the EnergySavvy office in Boston, supporting client solutions for the East Coast. He brings a wealth of experience understanding client needs and building successful organizations from over 14 years of defining, implementing, and supporting technology solutions and process improvements for mission critical business activities. Tony holds a BA in computer science from Williams College, is a certified Project Management Professional, and enjoys rock climbing in the Adirondacks!



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Tom Matzzie is Founder, President and CEO of Ethical Electric. For more than a dozen years Tom built big online communities for causes that disrupted incumbents in the space. His work developed innovations that today are best practices in online civic engagement. He is a widely recognized expert in this field. The New York Times Magazine profiled Tom's work with MoveOn.org calling him "a rising star." He has raised more than \$150 million online from millions of cause-related donors.

Tom continues to advise causes and companies in the social impact sector and he serves on the board of the Community Power Network—a network of community-scale renewable energy groups. In addition to pulling together the Ethical Electric team, Tom applies his deep experience in cause marketing to the customer acquisition program.



**Deidrea Miller**  
**NYPA**  
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**Deidrea Miller** is head of digital communications at the New York Power Authority (NYPA), overseeing the Authority's social media and web assets. In this role, she promotes the value and diversity of NYPA's work and the thought-leadership of NYPA's Executive Team. She has 10 years of communications experience, working for both public and private organizations, including the American International Group (AIG), and former Attorney General Eliot Spitzer. Most recently, she served as a spokeswoman for the NYC Department of Education.

Deidrea earned her Master of Marketing from the University of Melbourne in Australia and her Bachelor of Arts in History from the University of Michigan-Ann Arbor. Deidrea lives with her husband and daughter in Westchester County, NY.

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**Nikolas Rechiene, SMUD**  
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**Nikolas Rechiene** is a veteran business and market strategist in hot pursuit of clarity and simplicity. He has brought fresh thinking and new approaches to utility, banking and real estate industries. Nikolas has advised international firms and was recruited to Governor Schwarzenegger's unprecedented review of California State government, improving public sector performance and productivity with innovative service delivery models and strategic best practices. A life-long learner and tireless supporter of good ideas, he currently helps connect the dots at the Sacramento Municipal Utility District where he is a Project Manager in Customer Strategy.

Read one of his recommended articles on segmentation:  
<https://hbr.org/product/rediscovering-market-segmentation/an/R0602G-PDF-ENG#>



**Jenny Roehm**  
**Schneider Electric**  
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**Jenny Roehm** is part of a dynamic team delivering residential energy management solutions at Schneider Electric. Jenny's current work leverages her 20 plus years of experience to focus on the integration of demand side management resources; working with utilities and customers to integrate demand response, storage, on-site generation and energy efficiency into a single approach. She has managed load control programs and has worked with utilities as they implement programs. Jenny facilitated the Advanced Load Control Alliance (ALCA). The ALCA is a group of utilities that meet twice a year to discuss their demand response programs to continually improve how programs are delivered and measured.

Her experience includes program design, implementation and conducting measurement and verification studies on energy efficiency and demand response projects. Jenny is a Certified Measurement and Verification Professional, a designation granted by the Association of Energy Engineers for professionals who demonstrate competence and ethics in the field of measurement and verification.



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**Cindy Sargent** has moved a lot of people to move a lot of furniture. As a creative director working on the HGTV and DIY Network accounts, she helped create the brand positioning and drive demand for the fastest growing television networks in history. Beginning her agency career in New York, she has worked with national brands ranging from Sotheby's and DuPont to Dean Foods and the FOX Television Network. She has served as creative director in Nashville for The Buntin Group and Jackson Design and Marketing, heading up efforts for clients such as XO Communications, SunTrust Bank, Hospital Corporation of America, Gaylord, Warner Brothers and SONY Music. She co-founded agency Honsberger+Sargent, which was later sold to Earle Palmer Brown, then served as Vice-President/Creative Director at Lewis Communications where she was responsible for creating strategic brands and award-winning work. Most recently, she has helped strategically position and develop multi-channel campaigns for national and global brands, such as ORECK, New Orleans Economic Development and Schneider Electric.

In addition to winning numerous local, regional and national ADDYs, Cindy's work has been recognized by the EMMY Awards, Graphis, Print, ShowSouth, Creativity and Communication Arts, and she was three times awarded the Copywriter of the year award by the Nashville Advertising Federation.

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## Remarks from our Sponsor



**Yann Kulp**

**Yann Kulp**, VP, Residential Energy Solutions, Prosumer North America, **Schneider Electric** leads the team that created Wiser™ Residential Energy Management Solutions, focusing on providing energy efficient, reliable & customer-centric solutions for utilities, builders and contractors. He is also the strategist for connected & efficient home topics for North America. Prior to this role he was based at the Schneider Electric HQ in Paris as Director of Communication for the LifeSpace business EMEAS (65 countries) driving a significant transformation to customer and digital tools. Before joining Schneider Electric in 2004 Yann spent 12 years with Legrand in Europe and USA in sales & product management. After under-graduate studies in France, he completed his MBA at Syracuse University. He is now based in Chicago.

## Table Leaders for Breakouts and Design Exercise



**Roger Gray**

**Roger Gray**, Vice President of Business Development, Wiser North America, at **Schneider Electric** leads the business development team for Wiser™ Residential Energy Management Solutions with over 30 years of experience in sales, marketing and client relations in the energy management and utility services industry. Prior to Schneider Electric, Roger had a 16-year career with GoodCents Solutions where he designed, sold and managed demand response and energy efficiency projects for over 20 large IOUs and multiple cooperative and municipal electric utilities across North America. As a founder, he helped to grow GoodCents from 20 to over 500 employees by providing excellent service and creating individualized solutions for utilities. Roger's specialties include program design and development and regulatory compliance.



**Ryn Hamilton**

**Ryn Hamilton** has been an independent consultant since 1992. She provided personalized consulting services to clients throughout the demand response and energy efficiency value chain. The company has completed 120+ studies to promote adoption of demand-side alternatives to electric generation. Her educational background is in economics, with a concentration in econometrics. Her clients include utilities, government, ISOs/RTOs, start-ups and Wall Street analysts.

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**Kevin Hinson**  
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**Kevin Hinson** is Partner and Co-Creative Director of Brainspur. As creative director for popular travel destinations, he developed successful brand identities and marketing campaigns in the tourism and hospitality industries. He created economic development strategies and branding for diverse markets and regions. His extensive experience also includes award-winning work in the healthcare, beverage, restaurant, golfing and sporting goods industries where he created multi-platform consumer and B2B campaigns for prestigious national brands. He served as Executive Creative Director at NorthStar Destinations and as Vice-President/Creative Director at The Bohan Group, as well as in a senior creative position at national PR firm, Dye, VanMol & Lawrence. Kevin's work has been recognized on the regional, national and international levels by The One Show, the Andy Awards, the London International Advertising Awards, the EMMY Awards, the Moby Awards, Graphis, Print Design Annual, and as the ADDY Awards Best of Show.

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**Mark Michalski**  
**Cadmus**

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**Mark Michalski**, an associate with Cadmus, has a decade of energy-efficiency program planning, implementation, and marketing and communications experience. He leads the Marketing and Communications team within Cadmus' Energy Services Division. Mark is also a project manager for numerous projects including the Massachusetts Consumer Products & Lighting marketing initiative, GE & Target Utility Program marketing support, and works in support of ENERGY STAR marketing consumer electronics and water heaters. Mark has a MBA from the State University of New York at Albany, and is a member of the Association of Energy Service Professionals.



**Mei Shibata**  
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Mei Shibata is CEO of The Energy Agency, a strategic marketing firm specializing in the energy sector. Formerly, Mei was Chief Strategy Officer of ThinkEco, a cloud-based energy efficiency and demand response start-up she co-founded in 2008. Her leadership role at the start-up turned the ThinkEco modlet® into a very successful consumer-friendly product, leading to the creation and development of the coolNYC residential demand response program with strategic partner Consolidated Edison of New York. Over the past two years coolNYC has won two AESP awards, a PLMA award, and two Bulldog PR awards for customer engagement and marketing innovation. For her role at ThinkEco, Mei was recognized as one of New York's Top 10 Energy Entrepreneurs in 2013 and selected as a 2013 NYC Venture Fellow by the New York Economic Development Corporation.

Before ThinkEco, Mei worked in senior management roles at Fortune 500 companies for the last 15 years. Mei was Managing Director of Strategy and North American Executive Committee Member at the communications agency Havas Life where she helped numerous client branding teams in commercializing and marketing their products. Her professional experience includes a Worldwide Marketing Manager role at Pfizer, an Equity Research Associate Analyst position at Smith Barney Citigroup, and a management consultant role at strategy consulting firms Vertex Partners and Oliver, Wyman and Company. Mei received her BA in Physics from Harvard, MS in Medical Engineering from the joint Harvard/MIT HST Program and MBA from Harvard Business School.



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Omar Siddiqui, is a senior executive in the Energy Utilization area of the Electric Power Research Institute (EPRI), which spans customer-facing research areas of energy efficiency, demand response, electric transportation, distributed generation, energy storage, power quality, and customer behavior. Omar is responsible for technical leadership, marketing, and business development of multi-million dollar portfolio of RD&D and related advisory services to companies in the electric power industry.