ENVIRONMENTAL LAW & POLICY CENTER
Protecting the Midwest's Environment and Natural Heritage

April 20, 2020

Ms. Tanowa Troupe
Secretary, Public Utilities Commission of Ohio
180 East Broad Street
Columbus, Ohio 43215

RE: ELPC Evidence
Case No. 19-1940-GA-RDR

Dear Ms. Troupe:

Pursuant to the Attorney Examiner's Entry on April 1, 2020, the Environmental Law and Policy Center ("ELPC") notifies the Public Utilities Commission of Ohio, Commission Staff, and the Parties to this case that ELPC is filing the attached document productions from Columbia Gas of Ohio, Inc. as evidence related to Columbia's Demand Side Management ("DSM") Program. ELPC will not be filing additional evidence or expert testimony in this proceeding.

Please do not hesitate to contact me if you have any questions.

Sincerely,

*/s/ Caroline Cox*
Caroline Cox
Associate Attorney
Environmental Law & Policy Center
ccox@elpc.org
312.795.3742

Attachments
cc: Parties of Record

21 W. Broad Street, 8th Floor • Columbus, OH 43215
(612) 569-3872 • www.ELPC.org
Harry Drucker, Chairperson • Howard A. Learner, Executive Director
Chicago, IL • Columbus, OH • Des Moines, IA • Grand Rapids, MI • Indianapolis, IN
Minneapolis, MN • Madison, WI • North Dakota • South Dakota • Washington, D.C.

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PUCO Case No. 19-1940-GA-RDR
ELPC Interrogatory Set 1 No. 1
Respondent: Melissa L. Thompson

**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-1. After the Commission released the Opinion and Order dated December 21, 2016, when did Columbia begin its effort to coordinate a joint rebate program for smart thermostats?

**RESPONSE:**

In the Commission's December 21, 2016 Opinion and Order in Case No. 16-1309-GA-UNC, et al., at paragraph 71, the Commission noted "It is likely that customers will be eligible to receive a rebate from Columbia and through their electric distribution utility. We direct Columbia to work with AEP Ohio and FirstEnergy to ensure that customers are eligible to receive a rebate from both their gas and electric utilities, and, if applicable, their gas marketer, for the purchase of a smart thermostat and that customers are not prohibited from processing or receiving both rebates, preferably through a single application process."

Following the Opinion and Order, Columbia reached out to AEP Ohio and FirstEnergy. Columbia inquired with both electric distribution companies about a partnership. While AEP Ohio was not interested at that time in a consolidated rebate process due to separate implementation contractors, AEP Ohio did provide a link to Columbia's rebate from its website. Likewise, Columbia provided a link for its customers to AEP Ohio's website to direct customers to AEP Ohio's smart thermostat rebate. Columbia also inquired with FirstEnergy regarding a partnership with its smart thermostat rebates, but Columbia's efforts were unsuccessful.

While Columbia was attempting to work with AEP Ohio and FirstEnergy, ELPC filed an Application for Rehearing in that proceeding noting that the Commission's Opinion and Order only focused on RESA, IGS, and Staff to "streamline and/or enhance the rebate process." ELPC further noted that "all CRNG and CRES providers be a part of that process, not just RESA and IGS."

ELPC then requested that "The Commission should clarify that Columbia must engage with all CRNG and CRES providers that want to participate in the smart thermostat rebate program, and make the rebate available to all competitors." *See* ELPC App. for Rehearing at 4.

As Columbia noted in its Memorandum Contra to ELPC's Application for Rehearing, "All eligible CRNG suppliers may participate in the program, as Columbia partners with any interested CRNG Supplier certified for its service area." *See* Memo Contra at 11.

On April 10, 2019, the Commission issued its Second Entry on Rehearing in Case No. 16-1309-GA-UNC, et al. In the Second Entry on Rehearing, at paragraph 24, the Commission held "Further, recognizing that it may not be feasible for a Columbia customer to receive a rebate from both the gas and electric utilities and, if applicable, a competitive retail electric service (CRES) provider or gas marketer for the purchase of a smart thermostat, the Commission directed, in the DSM Order, Columbia to work with Ohio Power Company and the FirstEnergy Corporation electric distribution utilities to implement a single consolidated rebate application process. To that end, Columbia is directed to update the Commission on its progress in implementing a consolidated rebate process and indicate if and when the process is operational, the electric utilities or gas marketers with whom the consolidated rebate process is feasible, and the number of customer rebates processed. Columbia shall provide the consolidated rebate application process update as a part of its annual DSM rider application each year through 2022."

In response to the Commission's Second Entry on Rehearing, Columbia held numerous meetings (June 19, 2019; July 31, 2019; September 18, 2019; October 23, 2019; December 10, 2019; and March 3, 2020) and invited ELPC, Ohio Power Company, FirstEnergy Corporation, the Commission Staff, the Office of the Ohio Consumers' Counsel, all parties from Case No. 16-1309-GA-UNC, CRES, and CRNGS to work through and finalize a consolidated smart thermostat rebate process. Representatives from ELPC attended the June 19, 2019 kick off meeting, but did not attend any additional meetings. ELPC, to Columbia's recollection, has not reached out to Columbia personnel to further discuss the consolidated smart thermostat rebate process or any of its concerns outside of litigation in Case No. 18-1701-GA-RDR or this proceeding.

At the June 19, 2019, kick off meeting, Columbia explained to all participants that it had been directed to work with AEP and FirstEnergy, all CRES, and all CRNGS

to develop a consolidated smart thermostat rebate process. Columbia also sent all participants to the meeting draft survey questions for the participants to review and provide feedback before it was sent out. Columbia also explained to the parties that this survey was intended to understand each entity's smart thermostat program, what each entity was willing to contribute towards a smart thermostat program, and what each entity's terms and conditions were that would need to be considered to implement a smart thermostat program. Columbia also explained that the survey would be anonymous, with an optional field for identification, to project any confidential or sensitive information. Following the June 19, 2019 meeting, Columbia sent a survey to all participants invited to the June 19, 2019 kick off meeting. In response to the survey, 13 participants took the survey anonymously.

At the July 31, 2019 meeting, Columbia presented the results of the survey to all participants. The survey results showed that there was not a consistent method of delivering and running a smart thermostat rebate program. Columbia noted that at the next meeting, it would review these results further and present a high-level methodology for a consolidated smart thermostat rebate program. Specifically, Columbia focused on a way to deliver a consolidated smart thermostat rebate program with an online store.

At the September 18, 2019 meeting, Columbia presented a high-level methodology for a consolidated smart thermostat program. This presentation walked through the consolidated smart thermostat process for the EDUs and the CRES/CRNGS. Columbia invited the parties to the next meeting for Columbia's contractor, Uplight, to demonstrate the technology to implement a consolidated smart thermostat rebate.

At the October 23, 2019 meeting, Columbia's contractor, Uplight, presented a live demonstration of several sites that the contractor had built to demonstrate Columbia's proposed websites. Uplight answered questions from participants. At this meeting, FirstEnergy announced to the participants that it was not interested in participating in the consolidated smart thermostat rebate process.

At the December 10, 2019 meeting, Columbia reviewed its proposed smart thermostat rebate process again with the participants and answered questions. Columbia then asked all participants to review this process and inform Columbia of the entity's interest in pursuing this process by February 21, 2020. Columbia also asked any parties at this meeting if they would express their interest or

noninterest. At this meeting AEP Ohio noted it was not interested in participating in the consolidated smart thermostat rebate process.

At the March 3, 2020 meeting, Columbia thanked all participants for their participation in this process. Columbia informed all meeting attendees that no EDU, CRES, or CRNGS expressed interest in immediately pursuing the consolidated smart thermostat rebate process. After the meeting Columbia sent the following message to all participants:

> Thanks to everyone for your time and participation meeting with the Columbia Gas of Ohio Team to discuss a process to adopt a consolidated smart thermostat rebate process.
>
> Moving forward, we will no longer be hosting meetings at the Commission; however, if you or your company are interested in pursuing a consolidated smart thermostat rebate process with Columbia, please do not hesitate to reach out to any of the individuals listed below. If you reach out, we will also provide you with updated pricing to set up and maintain a microsite.

To date, Ohio Power Company and the FirstEnergy Corporation have declined to participate in a consolidated smart thermostat rebate process. Likewise, to date, Columbia has not received notice from any CRES or CRNGS that is interested in currently pursuing a consolidated smart thermostat rebate process. Columbia continues to work with the Commission Staff regarding the next steps to comply with the Commission's directive in paragraph 24.

Attached, also please find:

- ELPC Interrogatories Set 1, No. 1, Attachment A, which includes copies of the emails sent to all of the party participants in the consolidated smart thermostat meetings.
- ELPC Interrogatories Set 1, No. 1, Attachment B, which includes copies of the Agenda and the consolidated smart thermostat rebate process survey questions reviewed at the June 19, 2019 meeting.
- ELPC Interrogatories Set 1, No. 1, Attachment C, which includes the presentation of the consolidated smart thermostat rebate process survey results reviewed at the July 31, 2019 meeting.
- ELPC Interrogatories Set 1, No. 1, Attachment D, which includes the presentation of the consolidated smart thermostat rebate process presented at the September 19, 2019 meeting.

- ELPC Interrogatories Set 1, No. 1, Attachment E, which includes the presentation of the consolidated smart thermostat rebate process presented at the December 10, 2019 meeting

## Save the Date: June 22, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate )

Melissa L Thompson to: Tamara.Turkenton@puco.ohio.gov, Zee.Molter@puco.ohio.gov, Dorothy.Bremer@puco.ohio.gov, 05/31/2019 05:24 PM

Cc: sseiple, JosephClark, jlaverty, spoe, Christine Rausch

Bcc: utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller, consuelo.laureano, debora.churches, carrie.sheridan,

From: Melissa L Thompson/NCS/Enterprise

To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov"

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Bcc: utilityServices@aepenergy.com, mdutton@aepenergy.com, pkolch@aepenergy.com, mruan@ageraenergy.com, smuso@ageraenergy.com, regulatory@ageraenergy.com, cdickman@ebestsystems.com, elicht@ebestsystems.com, levi.moeller@alphagne.com,

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Good afternoon,
On behalf of Columbia Gas of Ohio, you are cordially invited to a meeting on Wednesday, June 22 at 10:00 am in Hearing Room 11-B at the PUCO's Offices (180 East Broad Street, Columbus, Ohio).

At this meeting, we will discuss the potential implementation of a consolidated smart thermostat rebate process for customers in Columbia Gas of Ohio's service area. Columbia will be distributing an agenda closer to this introductory meeting to guide our conversation regarding the potential partnership with electric distribution utilities, CRES and CRNG suppliers that operate within Columbia Gas of Ohio's service area.

We anticipate this kick off meeting will the first in a series of meetings to discuss the intricacies of developing a consolidated smart thermostat rebate process with Columbia's customers that may have overlapping eligibility with some of the EDU, CRES, and CRNG suppliers' programs.

Thank you in advance for attending this meeting, and we look forward to seeing you then.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
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## Fw: Save the Date: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate)

Melissa L Thompson to: Tamara.Turkenton@puco.ohio.gov, Zee.Molter@puco.ohio.gov, Dorothy.Bremer@puco.ohio.gov, 05/31/2019 10:17 PM

Cc: sseiple, JosephClark, jlaverty, spoe, Christine Rausch

Bcc: utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller, consuelo.laureano, debora.churches, carrie.sheridan,

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Thank you in advance for attending this meeting, sorry for the confusion regarding the date, and we look forward to seeing you then.

Best regards,
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## Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate )

Melissa L Thompson to: Tamara.Turkenton@puco.ohio.gov, Zee.Molter@puco.ohio.gov, Dorothy.Bremer@puco.ohio.gov, 06/18/2019 12:57 PM

Cc: sseiple, JosephClark, jlaverty, spoe, Christine Rausch

Bcc: utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller, consuelo.laureano, debora.churches, carrie.sheridan,

Good afternoon,
On behalf of Columbia Gas of Ohio, attached is our agenda for the meeting tomorrow morning at 10:00 am in Hearing Room 11-B at the PUCO's Offices (180 East Broad Street, Columbus, Ohio).

We will have a dial-in for the meeting. Please use:

1-855-481-1480
Passcode: 276250

For the meeting, we will be discussing a survey for all participants to take to after the meeting to understand how all EDUs, CRES, and CRNG suppliers. The survey is attached for your review.

Thank you all for your participation tomorrow.

Best regards,
Melissa

Consolidated Smart Thermostat Rebate Agenda - 6.19.2019.pdf

Consolidated Smart Thermostat Rebate Process Survey - 6.19.2019.docx

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----- Forwarded by Melissa L Thompson/NCS/Enterprise on 06/11/2019 02:31 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, Andrew Metz/COH/Enterprise@NISOURCE, bojko@carpenterlipps.com, callwein@keglerbrown.com, cendsley@ofbf.org, Cheryl MacDonald/NCS/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov,

Cc: joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org, sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE
Date: 05/31/2019 10:17 PM
Subject: Fw: Save the Date: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate)

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## Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate ) - Follow up Email

Melissa L Thompson to: Tamara.Turkenton@puco.ohio.gov, Zee.Molter@puco.ohio.gov, Dorothy.Bremer@puco.ohio.gov, 06/20/2019 08:37 PM

Cc: sseiple, JosephClark, jlaverty, spoe, ametz, Christine Rausch
Bcc: utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller, consuelo.laureano, debora.churches, carrie.sheridan,

Good evening,
Thank you to everyone who attended yesterday's kick-off meeting. We know you all have very busy schedules, and truly appreciate you all setting aside time to talk through the Commission's directives.

To follow up our meeting, we are asking for you edits or changes to our draft survey, which is attached, by next Friday, June 28.

Consolidated Smart Thermostat Rebate Process Survey - 6.19.2019.docx

Thereafter, we will distribute the final survey electronically for your review the first week of July. We are asking for your responses to this survey by July 19.

Our next meeting will be on Wednesday, July 31 at 10:00 am in Hearing Room 11-C at the PUCO's Offices (180 East Broad Street, Columbus, Ohio). We will be reviewing the survey responses.

For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

Thank you all for your participation, and have a wonderful weekend!

Best regards,
Melissa

Sign In Sheet - 6.19.2019.pdf

Melissa L. Thompson
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|---|---|
| | <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, bojko@carpenterlipps.com, cendsley@ofbf.org, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org, emille3@firstenergycorp.com, nwilliams@firstenergycorp.com, "Settineri, Michael J." <mjsettineri@vorys.com>, Amy Milam <amilam@ofbf.org>, Chad Endsley <cendsley@ofbf.org>, Dale Arnold <darnold@ofbf.org>, Leah Curtis <lcurtis@ofbf.org>, |
| Cc: | sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE |
| Date: | 06/18/2019 12:57 PM |
| Subject: | Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate) |

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| Date: | 05/31/2019 10:17 PM |

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## Consolidated Smart Thermostat Rebate Process Survey Reminder

Melissa L Thompson to: Tamara.Turkenton@puco.ohio.gov, Zee.Molter@puco.ohio.gov, Dorothy.Bremer@puco.ohio.gov, 07/15/2019 07:52 AM

Cc: sseiple, JosephClark, jlaverty, spoe, ametz, Christine Rausch

Bcc: utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller, consuelo.laureano, debora.churches, carrie.sheridan,

Good morning,
We just wanted to send a quick reminder to everyone to please complete the Consolidated Smart Thermostat Rebate Process Survey by this Friday, July 19. For those who have not completed the survey, or received the survey emails, please use the link below.

https://www.surveymonkey.com/r/ConsolidatedRebateProcessSurvey

We will be reviewing the survey responses at our next meeting on Wednesday, July 31 at 10:00 am in Hearing Room 11-C at the PUCO's Offices (180 East Broad Street, Columbus, Ohio). For those unable to attend in person, we will be using the following dial-in for the meeting:

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Passcode: 276250

Thank you all for your participation, and I hope you had a wonderful weekend!

Best regards,
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----- Forwarded by Melissa L Thompson/NCS/Enterprise on 07/15/2019 07:44 AM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, bojko@carpenterlipps.com, cendsley@ofbf.org, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org, emille3@firstenergycorp.com, nwilliams@firstenergycorp.com, "Settineri, Michael J." <mjsettineri@vorys.com>, Amy Milam <amilam@ofbf.org>, Chad Endsley <cendsley@ofbf.org>, Dale Arnold <darnold@ofbf.org>, Leah Curtis <lcurtis@ofbf.org>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, alla.tempesta@puco.ohio.gov, craig.smith@puco.ohio.gov,
Cc: sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, ametz@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE
Date: 06/20/2019 08:37 PM

Subject: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate) - Follow up Email

Good evening,
Thank you to everyone who attended yesterday's kick-off meeting. We know you all have very busy schedules, and truly appreciate you all setting aside time to talk through the Commission's directives.

To follow up our meeting, we are asking for you edits or changes to our draft survey, which is attached, by next Friday, June 28.

Thereafter, we will distribute the final survey electronically for your review the first week of July. We are asking for your responses to this survey by July 19.

Our next meeting will be on Wednesday, July 31 at 10:00 am in Hearing Room 11-C at the PUCO's Offices (180 East Broad Street, Columbus, Ohio). We will be reviewing the survey responses.

For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

Thank you all for your participation, and have a wonderful weekend!

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
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mlthompson@nisource.com

----- Forwarded by Melissa L Thompson/NCS/Enterprise on 06/20/2019 08:18 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, bojko@carpenterlipps.com, cendsley@ofbf.org, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org, emille3@firstenergycorp.com, nwilliams@firstenergycorp.com, "Settineri, Michael J." <mjsettineri@vorys.com>, Amy Milam <amilam@ofbf.org>, Chad Endsley <cendsley@ofbf.org>, Dale Arnold <darnold@ofbf.org>, Leah Curtis <lcurtis@ofbf.org>,
Cc: sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE
Date: 06/18/2019 12:57 PM
Subject: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate)

Good afternoon,
On behalf of Columbia Gas of Ohio, attached is our agenda for the meeting tomorrow morning at 10:00

am in Hearing Room 11-B at the PUCO's Offices (180 East Broad Street, Columbus, Ohio).

We will have a dial-in for the meeting. Please use:

1-855-481-1480
Passcode: 276250

For the meeting, we will be discussing a survey for all participants to take to after the meeting to understand how all EDUs, CRES, and CRNG suppliers. The survey is attached for your review.

Thank you all for your participation tomorrow.

Best regards,
Melissa

Melissa L. Thompson
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----- Forwarded by Melissa L Thompson/NCS/Enterprise on 06/11/2019 02:31 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, Andrew Metz/COH/Enterprise@NISOURCE, bojko@carpenterlipps.com, callwein@keglerbrown.com, cendsley@ofbf.org, Cheryl MacDonald/NCS/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org,
Cc: sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE
Date: 05/31/2019 10:17 PM
Subject: Fw: Save the Date: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate)

---

Good evening,
On behalf of Columbia Gas of Ohio, you are cordially invited to a meeting on Wednesday, June 19 at 10:00 am in Hearing Room 11-B at the PUCO's Offices (180 East Broad Street, Columbus, Ohio).

At this meeting, we will discuss the potential implementation of a consolidated smart thermostat rebate process for customers in Columbia Gas of Ohio's service area. Columbia will be distributing an agenda closer to this introductory meeting to guide our conversation regarding the potential partnership with electric distribution utilities, CRES and CRNG suppliers that operate within Columbia Gas of Ohio's service area.

We anticipate this kick off meeting will the first in a series of meetings to discuss the intricacies of developing a consolidated smart thermostat rebate process with Columbia's customers that may have overlapping eligibility with some of the EDU, CRES, and CRNG suppliers' programs.

Thank you in advance for attending this meeting, sorry for the confusion regarding the date, and we look forward to seeing you then.

Best regards,
Melissa

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## Consolidated Smart Thermostat Rebate Process Survey Results

Melissa L Thompson to: alla.tempesta, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, cmooney, 07/30/2019 04:01 PM

Bcc: utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller, consuelo.laureano, debora.churches, carrie.sheridan,

Good afternoon,
We look forward to seeing everyone tomorrow at 10:00 am in Hearing Room 11-C at the PUCO's Offices (180 East Broad Street, Columbus, Ohio). For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

Tomorrow we will be reviewing the survey results. In advance of this meeting, please see the survey results attached for your review.

Thank you all for your participation, and we look forward to seeing you soon!

Best regards,
Melissa

Consolidated Smart Thermostat Rebate Survey Results.pdf

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## Consolidated Smart Thermostat Rebate Process - Next Meeting, September 18

Melissa L Thompson to: alla.tempesta, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, cmooney, 08/05/2019 09:08 PM

Bcc: utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller, consuelo.laureano, debora.churches, carrie.sheridan,

Good evening,
Thank you to everyone who attended, in person or by phone, last week's Consolidated Smart Thermostat Rebate Process Meeting. Attached, is an electronic copy of the sign-in sheet from that meeting.

We have scheduled our next meeting for Wednesday, September 18 at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers.

Thank you all for your participation, and we look forward to seeing you soon!

Best regards,
Melissa

Sign-in Sheet.pdf

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## Consolidated Smart Thermostat Rebate Process Meeting - Wednesday, September 18

Melissa L Thompson to: alla.tempesta, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, cmooney, 09/16/2019 04:07 PM

Bcc: utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller, consuelo.laureano, debora.churches, carrie.sheridan,

Good afternoon,
We are looking forward to seeing everyone this Wednesday, September 18, at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers. The presentation showing this high-level structure is attached below.

Thank you all for your continued participation, and we will see you soon.

Best regards,
Melissa

Consolidated Smart Thermostat Rebate Presentation.pdf

Melissa L. Thompson
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Melissa L Thompson | Good evening, Thank you to everyone who att... | 08/05/2019 09:08:05 PM

From: Melissa L Thompson/NCS/Enterprise
To: alla.tempesta@puco.ohio.gov, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov"

<Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 08/05/2019 09:08 PM
Subject: Consolidated Smart Thermostat Rebate Process - Next Meeting, September 18

Good evening,
Thank you to everyone who attended, in person or by phone, last week's Consolidated Smart Thermostat Rebate Process Meeting. Attached, is an electronic copy of the sign-in sheet from that meeting.

We have scheduled our next meeting for Wednesday, September 18 at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers.

Thank you all for your participation, and we look forward to seeing you soon!

Best regards,
Melissa

[attachment "Sign-in Sheet.pdf" deleted by Melissa L Thompson/NCS/Enterprise]

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## Next Consolidated Smart Thermostat Rebate Process Meeting - Wednesday, October 23

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 09/20/2019 06:29 PM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

Good afternoon,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting this past Wednesday. For your convenience, I've attached the presentation and the sign-in sheet from that meeting.

Our next meeting will be on Wednesday, October 23 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we anticipate receiving your feedback on the high level structure presented by Columbia. Columbia's smart thermostat contractor, Uplight, will also walk through a presentation.

Thanks everyone for your continued participation, and we look forward to seeing you in October.

Best regards,
Melissa

Consolidated Smart Thermostat Rebate Presentation.pdf Sign In Sheet - 9.18.2019.pdf

Melissa L. Thompson
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----- Forwarded by Melissa L Thompson/NCS/Enterprise on 09/20/2019 06:05 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: alla.tempesta@puco.ohio.gov, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov"

<Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 09/16/2019 04:07 PM
Subject: Consolidated Smart Thermostat Rebate Process Meeting - Wednesday, September 18

Good afternoon,
We are looking forward to seeing everyone this Wednesday, September 18, at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers. The presentation showing this high-level structure is attached below.

Thank you all for your continued participation, and we will see you soon.

Best regards,
Melissa

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| Melissa L Thompson | Good evening, Thank you to everyone who att... | 08/05/2019 09:08:05 PM |
|---|---|---|

From: Melissa L Thompson/NCS/Enterprise
To: alla.tempesta@puco.ohio.gov, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 08/05/2019 09:08 PM
Subject: Consolidated Smart Thermostat Rebate Process - Next Meeting, September 18

Good evening,
Thank you to everyone who attended, in person or by phone, last week's Consolidated Smart Thermostat Rebate Process Meeting. Attached, is an electronic copy of the sign-in sheet from that meeting.

We have scheduled our next meeting for Wednesday, September 18 at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the

meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers.

Thank you all for your participation, and we look forward to seeing you soon!

Best regards,
Melissa

[attachment "Sign-in Sheet.pdf" deleted by Melissa L Thompson/NCS/Enterprise]

Melissa L. Thompson
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## Re: Next Consolidated Smart Thermostat Rebate Process Meeting - Tomorrow, Wednesday, October 23

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 10/22/2019 03:33 PM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

Good afternoon,
We look forward to seeing everyone tomorrow at the next Columbia Gas of Ohio Consolidated Smart Thermostat Rebate Process Meeting. We will be meeting tomorrow at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we anticipate receiving your feedback on the high level structure presented by Columbia at the last meeting. Columbia's smart thermostat contractor, Uplight, will also walk through a presentation, which can be accessed at the following link during the meeting:
https://zoom.us/j/5183667147

Thanks everyone for your continued participation, and we look forward to seeing you tomorrow.

Best regards,
Melissa

Consolidated Smart Thermostat Rebate Presentation.pdf

Melissa L. Thompson
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----- Forwarded by Melissa L Thompson/NCS/Enterprise on 10/22/2019 03:26 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com,

"suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>,
"Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>,
"Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 09/20/2019 06:29 PM
Subject: Next Consolidated Smart Thermostat Rebate Process Meeting - Wednesday, October 23

Good afternoon,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting this past Wednesday. For your convenience, I've attached the presentation and the sign-in sheet from that meeting.

Our next meeting will be on Wednesday, October 23 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we anticipate receiving your feedback on the high level structure presented by Columbia. Columbia's smart thermostat contractor, Uplight, will also walk through a presentation.

Thanks everyone for your continued participation, and we look forward to seeing you in October.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
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Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

## Next Consolidated Smart Thermostat Rebate Process Meeting - Tuesday, December 10

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 10/24/2019 05:21 PM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

Good afternoon,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting yesterday. For your convenience, I've attached the sign-in sheet from that meeting.

Our next meeting will be on Tuesday, December 10 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we anticipate receiving your feedback on structure presented by Columbia, as well as reviewing with everyone a more detailed consolidated smart thermostat rebate process.

Thanks everyone for your continued participation, and we look forward to seeing you in December.

Best regards,
Melissa

Sign In Sheet - 10.23.2019.pdf

Melissa L. Thompson
Director of Regulatory Policy
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## Consolidated Smart Thermostat Rebate Process Meeting - Tuesday, December 10

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 12/09/2019 05:45 PM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

Good afternoon,
We are looking forward to seeing you tomorrow morning at the consolidated smart thermostat rebate processing meeting.

Our meeting will be at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we anticipate receiving your feedback on structure presented by Columbia, as well as providing the parties a high-level cost for pursuing the proposed structure.

Thanks everyone for your continued participation, and we look forward to seeing you soon.

Best regards,
Melissa

Consolidated Smart Thermostat Rebate Presentation_12-10-2019.pdf

Melissa L. Thompson
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mlthompson@nisource.com

Melissa L Thompson | Good afternoon, Thank you to everyone who... | 10/24/2019 05:21:26 PM

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com,

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Date: 10/24/2019 05:21 PM
Subject: Next Consolidated Smart Thermostat Rebate Process Meeting - Tuesday, December 10

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Passcode: 276250

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Thanks everyone for your continued participation, and we look forward to seeing you in December.

Best regards,
Melissa

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mlthompson@nisource.com

## Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 12/10/2019 08:41 PM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

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Importantly, Columbia is requesting your response of your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020.**

Thanks everyone for your continued participation, have a safe and wonderful holiday, and we will see you in the new year!

Best regards,
Melissa

Sign-in Sheet 12.10.2019.pdf

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## Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 01/13/2020 11:02 AM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

Good morning,
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Thanks everyone for your participation in this process.

Best regards,
Melissa

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Melissa L Thompson | Good evening, Thank you to everyone who att... | 12/10/2019 08:41:57 PM

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, "Spottswood, Jhay" <JSpottswood@bricker.com>, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 12/10/2019 08:41 PM
Subject: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

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1-855-481-1480
Passcode: 276250

At this meeting, we will review the responses from the electric, CRES, and CRNG suppliers as to each company's interest in the consolidated smart thermostat rebate process. We will also review any next steps.

Importantly, Columbia is requesting your response of your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020.**

Thanks everyone for your continued participation, have a safe and wonderful holiday, and we will see you in the new year!

Best regards,
Melissa

Sign-in Sheet 12.10.2019.pdf

Melissa L. Thompson
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## Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb . 21, 2020)

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 02/11/2020 04:25 PM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

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Best regards,
Melissa

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Columbus, Ohio 43215
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mlthompson@nisource.com

----- Forwarded by Melissa L Thompson/NCS/Enterprise on 02/11/2020 04:22 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, "Spottswood, Jhay" <JSpottswood@bricker.com>, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 01/13/2020 11:02 AM
Subject: Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

---

Good morning,
I wanted to send a follow-up note requesting your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020**.

Thanks everyone for your participation in this process.

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| | | |
|---|---|---|
| Melissa L Thompson | Good evening, Thank you to everyone who att... | 12/10/2019 08:41:57 PM |

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, "Spottswood, Jhay" <JSpottswood@bricker.com>, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 12/10/2019 08:41 PM
Subject: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

Good evening,
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Our next meeting will be on Tuesday, March 3, 2020 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will review the responses from the electric, CRES, and CRNG suppliers as to each company's interest in the consolidated smart thermostat rebate process. We will also review any next steps.

Importantly, Columbia is requesting your response of your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020.**

Thanks everyone for your continued participation, have a safe and wonderful holiday, and we will see you in the new year!

Best regards,
Melissa

Sign-in Sheet 12.10.2019.pdf

Melissa L. Thompson
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**Reminder: Next Meeting - Tuesday, March 3, 2020**

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 03/02/2020 07:12 PM

Good evening,
Just sending a quick reminder that we are meeting tomorrow, March 3, 2020, at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will review the responses from the electric, CRES, and CRNG suppliers as to each company's interest in the consolidated smart thermostat rebate process. We will also review any next steps.

Thanks everyone for your continued participation, and we look forward to meeting tomorrow.

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[attachment "Sign-in Sheet 12.10.2019.pdf" deleted by Melissa L Thompson/NCS/Enterprise]

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## Reminder: Next Meeting - Tuesday, March 3, 2020

Melissa L Thompson to: 03/02/2020 07:12 PM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

Good evening,
Just sending a quick reminder that we are meeting tomorrow, March 3, 2020, at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will review the responses from the electric, CRES, and CRNG suppliers as to each company's interest in the consolidated smart thermostat rebate process. We will also review any next steps.

Thanks everyone for your continued participation, and we look forward to meeting tomorrow.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
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Columbus, Ohio 43215
Office: (614) 460-5542
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mlthompson@nisource.com

| Melissa L Thompson | Good evening, Thank you to everyone who att... | 12/10/2019 08:41:57 PM |
|---|---|---|

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, "Spottswood, Jhay" <JSpottswood@bricker.com>, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 12/10/2019 08:41 PM
Subject: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

Good evening,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting today. For your convenience, I've attached the sign-in sheet from today's meeting.

Our next meeting will be on Tuesday, March 3, 2020 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will review the responses from the electric, CRES, and CRNG suppliers as to each company's interest in the consolidated smart thermostat rebate process. We will also review any next steps.

Importantly, Columbia is requesting your response of your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020.**

Thanks everyone for your continued participation, have a safe and wonderful holiday, and we will see you in the new year!

Best regards,
Melissa

[attachment "Sign-in Sheet 12.10.2019.pdf" deleted by Melissa L Thompson/NCS/Enterprise]

Melissa L. Thompson
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## Consolidated Smart Thermostat Rebate Process - Closure Email and Next Steps

Melissa L Thompson to: Alla.Magaziner-Tempesta@puco.ohio.gov, ametz, amilam, Barbara.Bossart@puco.ohio.gov, bojko, cendsley, Christine Rausch, christopher.healey, 03/03/2020 11:14 AM

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine

Good morning,
Thanks to everyone for your time and participation meeting with the Columbia Gas of Ohio Team to discuss a process to adopt a consolidated smart thermostat rebate process.

Moving forward, we will no longer be hosting meetings at the Commission; however, if you or your company are interested in pursuing a consolidated smart thermostat rebate process with Columbia, please do not hesitate to reach out to any of the individuals listed below. If you reach out, we will also provide you with updated pricing to set up and maintain a microsite.

Columbia Personnel
Melissa Thompson, (614) 460-5542, mlthompson@nisource.com
Jack Laverty, (614) 460-4714, jlaverty@nisource.com
Sarah Poe, (614) 460-4632, spoe@nisource.com
Andrew Metz, (614) 460-4931, ametz@nisource.com
Chris Rausch, (614) 460-4630, crausch@nisource.com
Joe Clark, (614) 460-6988, josephclark@nisource.com

Thank you all again for your efforts!

Best regards,
Melissa

Consolidated Rebate Process Sign In Sheet_3-3-2020.pdf

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## Consolidated Smart Thermostat Rebate Process - Closure Email and Next Steps

Melissa L Thompson to: 03/03/2020 11:16 AM

Bcc: "Spencer, Kathryn S.", "McFadin, Patricia", utilityServices, mdutton, pkolch, mruan, smuso, regulatory, cdickman, elicht, levi.moeller, alpha, mag, dina, gasops, regulatory, LisaB, clairel, eliek, morrisk, timothy.muller,

Good morning,
Thanks to everyone for your time and participation meeting with the Columbia Gas of Ohio Team to discuss a process to adopt a consolidated smart thermostat rebate process.

Moving forward, we will no longer be hosting meetings at the Commission; however, if you or your company are interested in pursuing a consolidated smart thermostat rebate process with Columbia, please do not hesitate to reach out to any of the individuals listed below. If you reach out, we will also provide you with updated pricing to set up and maintain a microsite.

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Chris Rausch, (614) 460-4630, crausch@nisource.com
Joe Clark, (614) 460-6988, josephclark@nisource.com

Thank you all again for your efforts!

Best regards,
Melissa

Consolidated Rebate Process Sign In Sheet_3-3-2020.pdf

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Columbia Gas of Ohio
A NiSource Company

**Columbia Gas of Ohio**
**Consolidated Smart Thermostat Rebate Meeting**
**PUCO Hearing Room 11-B**
**1-855-481-1480, Passcode 276250**

**Meeting Agenda**
**June 19, 2019**

1. Introductions of the Columbia Team

2. Purpose and Goal of the Meeting
    a. Columbia's residential customers have the ability to participate in a consolidated smart thermostat rebate process with all electric distribution utilities, CRES, and CRNG suppliers that serve Columbia's service area
    b. Commission directive in Case No. 16-1309-GA-UNC, *et al.*

3. Survey of Programmatic Information from participating parties
    a. Smart Thermostats offered
    b. Rebate levels and types of rebates (*e.g.*, in-store, utility e-store, retailer website, etc.)
    c. Contractors currently implementing smart thermostat programs and length of contract term
    d. Programmatic considerations
        i. Cost effectiveness
        ii. Program budget
        iii. Customer verification and eligibility
        iv. Customer agreement for rebate
        v. Limits on smart thermostats per household

4. Confidentiality of Survey Responses

5. Next steps and next meeting

**Columbia Gas of Ohio**
**Simple Energy Solutions Program**
**Consolidated Smart Thermostat Rebate Process Survey Questions**

1. Smart Thermostats Offered
    a. Do you offer:
        i. Nest Thermostat E
        ii. Nest Learning Thermostat 3rd Generation
        iii. Ecobee Smart Thermostat with Voice Control
        iv. Ecobee3 Lite Wi-Fi Thermostat
        v. Honeywell Lyric TS+ Wi-Fi Thermostat
        vi. Honeywell Wi-Fi Color Touch Screen Programmable Thermostat
        vii. Emerson Sensi Classic Wi-Fi Thermostat
        viii. Emerson Sensi Touch Smart Thermostat with Color Touchscreen
        ix. Lux Geo Wi-Fi Thermostat
        x. Hive Heating & Cooling Pack
        xi. Others, Please Specify

    b. What are your standards/requirements for a smart thermostat to receive incentives?

2. Rebate Levels and Types of Rebates
    a. What are the rebate levels for a smart thermostat?

    b. Current process for incentives
        i. What delivery methods do you use to provide customers with a smart thermostat rebate?
            1. Online – instant via an e-store
            2. Online – instant via other manufacturer or retailer websites
                a. If yes, which manufacturer or retailer websites have your instant rebates available?
            3. Instant in-store at retailers
                a. If yes, which retailers have your instant rebates available?
            4. Post-purchase via an online application
            5. Post-purchase via a mail-in rebate application
            6. Other. Please Specify

3. Contractors Currently Implementing Smart Thermostat Programs and Length of Contract Term

    a. What implementation vendor(s) do you utilize for each delivery method?
        1. Online – instant via an e-store
        2. Online – instant via other manufacturer or retailer websites
        3. Instant in-store at retailers
        4. Post-purchase via an online application
        5. Post-purchase via a mail-in rebate application
        6. Other. Please Specify

    b. What is the contract term with each vendor for the following delivery methods?
        1. Online – instant via an e-store
        2. Online – instant via other manufacturer or retailer websites
        3. Instant in-store at retailers
        4. Post-purchase via an online application
        5. Post-purchase via a mail-in rebate application
        6. Other. Please Specify

4. Programmatic Considerations

    a. Cost Effectiveness
        i. Do you utilize cost effective tests to determine the cost effectiveness of your program?
            If so, please confirm whether you use:
            a. Societal Cost Test
            b. Total Resource Cost Test
            c. Participant Cost Test
            d. Utility Cost Test
            e. Rate Impact Method
        ii. Please describe any other cost effectiveness considerations you utilize to analyze your smart thermostat rebate program.
    b. Program Budgetary Constraints
        i. What is your annual smart thermostat program budget?

ii. What portion of your annual smart thermostat program budget could you contribute towards a consolidated smart thermostat rebate process for Columbia Gas of Ohio Customers?
iii. How many smart thermostats do you estimate could be incentivized on an annual basis for Columbia Gas of Ohio's service area?

c. Customer Verification and Eligibility
   i. Do you verify customer eligibility for your smart thermostat rebate?
      If no, then do you utilize a third party to verify eligible customers?
      a. If yes, then can you list this third party?
      b. If yes, what is the contract term with this third party vendor?
   ii. Are there eligibility requirements to a Columbia Customer receiving a smart thermostat rebate from you?
      If yes, what are these eligibility requirements?
      a. Residential customer?
      b. An active customer with Columbia Gas of Ohio?
      c. An active customer with an EDU?
      d. Enrolled with a CRES provider?
      e. Enrolled with a CRNG supplier?
      f. Other requirements for eligibility. Please specify.

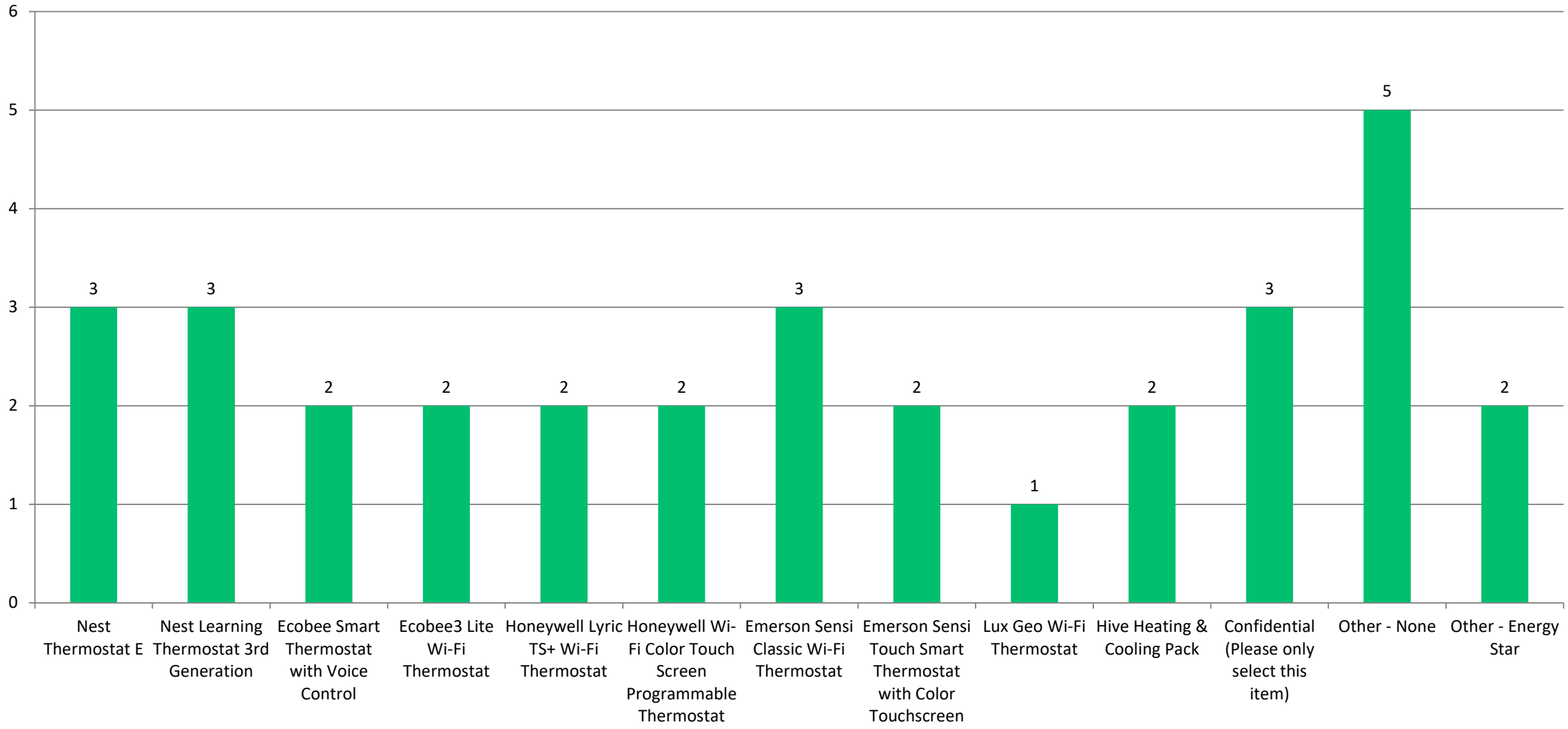
d. Customer Agreement for Rebate
   i. Do you require a customer to pay back the rebate for any reason?
      If yes, what are those requirements for reimbursement?
   ii. Do you require a customer to abide by any other terms and conditions to receive a smart thermostat rebate?
      If yes, what are those terms and conditions?

e. Limits on smart thermostats
   i. Do you have any restrictions on the number of smart thermostat rebates for which a customer is eligible? If yes, please describe.

# Consolidated Smart Thermostat Rebate Process

July 31, 2019

# Q1) What smart thermostats do you offer?




Columbia offers smart thermostat rebates on any thermostat that is Energy Star Certified. The listed products are Energy Star Certified.

# Q2) What are your standards/requirements for a smart thermostat to receive incentives?

| Responses | Number of Responses |
|---|---|
| N/A | 8 |
| Energy Star | 3 |
| Ease of Rebate Application for the customer | 1 |

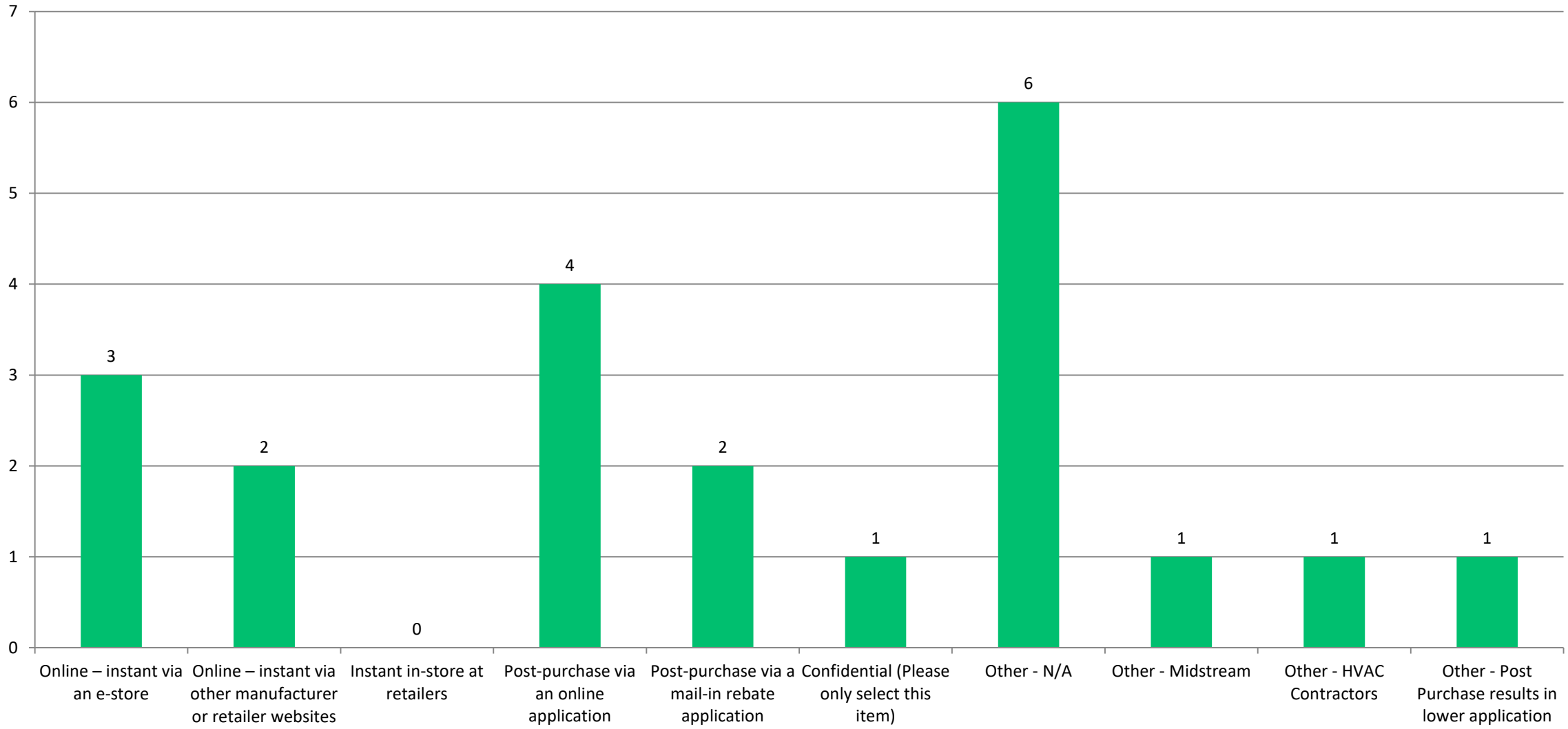
Columbia offers smart thermostat rebates on any thermostat that is Energy Star Certified.

# Q3) What are your rebate levels for a smart thermostat?

| Responses | Number of Responses |
|---|---|
| N/A | 8 |
| $30 | 1 |
| $25 Gas Heated Homes, $75 Electric Heated Homes | 2 |
| Varies | 1 |

Columbia offers a $75 rebate on smart thermostats.

# Q4) What delivery methods do you use to provide customers with a smart thermostat rebate?




Columbia offers instant rebates for smart thermostats online at our store and on manufacturer websites, in certain home improvement stores, post-purchase online and via the mail. Columbia also offers smart thermostat rebates via our audit and commercial programs.

# Q5) What implementation vendor(s) do you utilize for each of the following delivery methods?

| Responses | Number of Responses |
|---|---|
| Instant In-store at retailers | 1 |
| Online – instant via an e-store | 4 |
| Online - instant via other manufacturer or retailer websites | 2 |
| Post-purchase via an online application | 3 |
| Post-purchase via a mail-in rebate application | 2 |
| Other | 9 |

| | Instant In-store at retailers | Online – instant via an e-store | Online - instant via other manufacturer or retailer websites | Post-Purchase via an online application | Post-purchase via a mail-in rebate application | Other |
|---|---|---|---|---|---|---|
| CLEAResult | 1 | | 1 | 2 | 1 | 1 |
| Simple Energy | | 1 | | | | |
| Enervee | | 2 | 1 | | | |
| EFI | | | | 1 | | |
| Honeywell | | | | | | 1 |
| N/A | | | | | | 5 |
| Confidential | | 1 | 1 | 1 | 1 | |

Simple Energy implements Columbia's online presence, post-purchase rebates, and the in-store rebate process. CLEAResult provides the in-store merchandising support for the program.

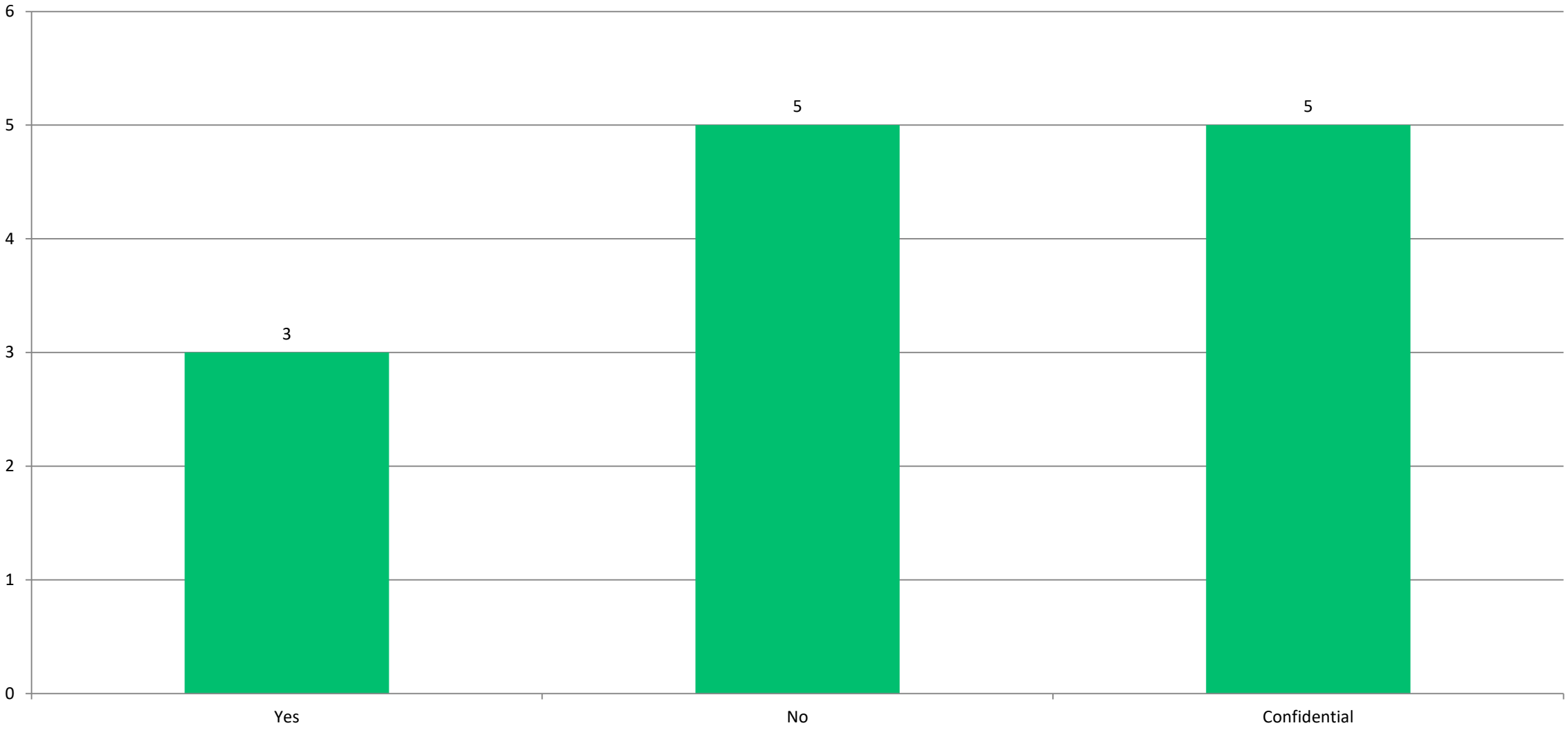
# Q6) What is the contract term with each vendor for each of the following delivery methods?

| Responses | Number of Responses |
|---|---|
| Instant In-store at retailers | 1 |
| Online – instant via an e-store | 3 |
| Online - instant via other manufacturer or retailer websites | 1 |
| Post-Purchase via an online application | 2 |
| Post-purchase via a mail-in rebate application | 1 |
| Other | 9 |

| OTHER | Instant In-store at retailers | Online – instant via an e-store | Online - instant via other manufacturer or retailer websites | Post-Purchase via an online application | Post-purchase via a mail-in rebate application | Other |
|---|---|---|---|---|---|---|
| 12/31/2019 | | | | | | |
| 12/31/2020 | 1 | 2 | 1 | 2 | 1 | 1 |
| N/A | | | | | | 6 |
| Confidential | | 1 | | | | 1 |

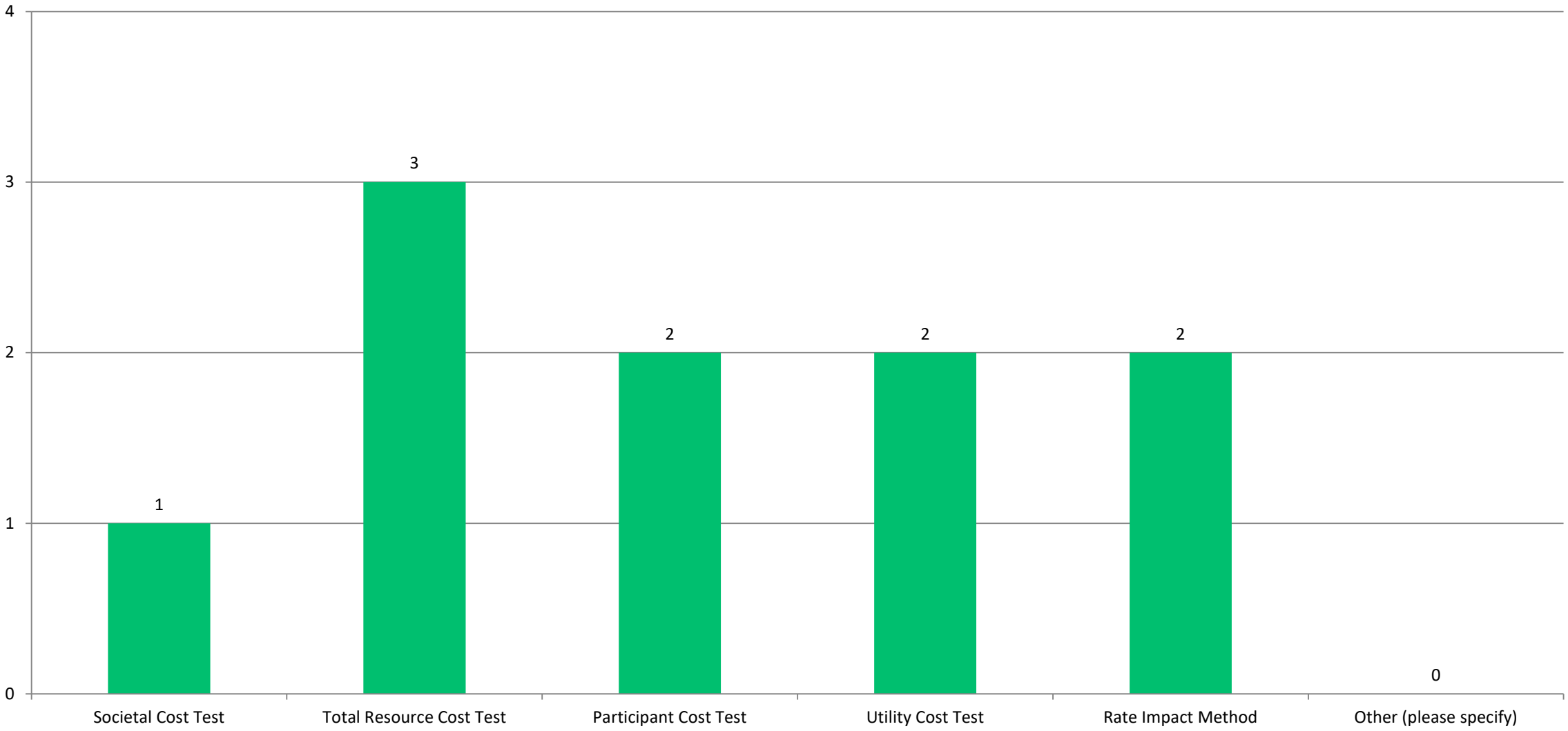
All of Columbia's contracts last until 2022.

# Q7) Do you utilize cost effective tests to determine the cost effectiveness of your program? (Select Only One Response)




Columbia uses a cost test to determine cost effectiveness.

# Q8) Please check which cost test you use.




Columbia uses the Utility Cost test (UCT).

# Q9) Please describe any other cost effectiveness considerations you utilize to analyze your smart thermostat rebate program.

| Responses | Number of Responses |
|---|---|
| N/A | 6 |
| None | 2 |

Columbia uses the Utility Cost test (UCT).

# Q10) What is your annual smart thermostat program budget?

| Responses | Number of Responses |
|---|---|
| Budgets are not at measure level | 1 |
| Confidential | 4 |
| Varies | 1 |
| $0 | 1 |
| N/A | 4 |

The approved budgets for Columbia are not approved at the measure level.

# Q11) What portion of your annual smart thermostat program budget could you contribute towards a consolidated smart thermostat rebate process for Columbia Gas of Ohio Customers?

| Responses | Number of Responses |
|---|---|
| N/A | 6 |
| Confidential | 1 |
| 0% | 2 |

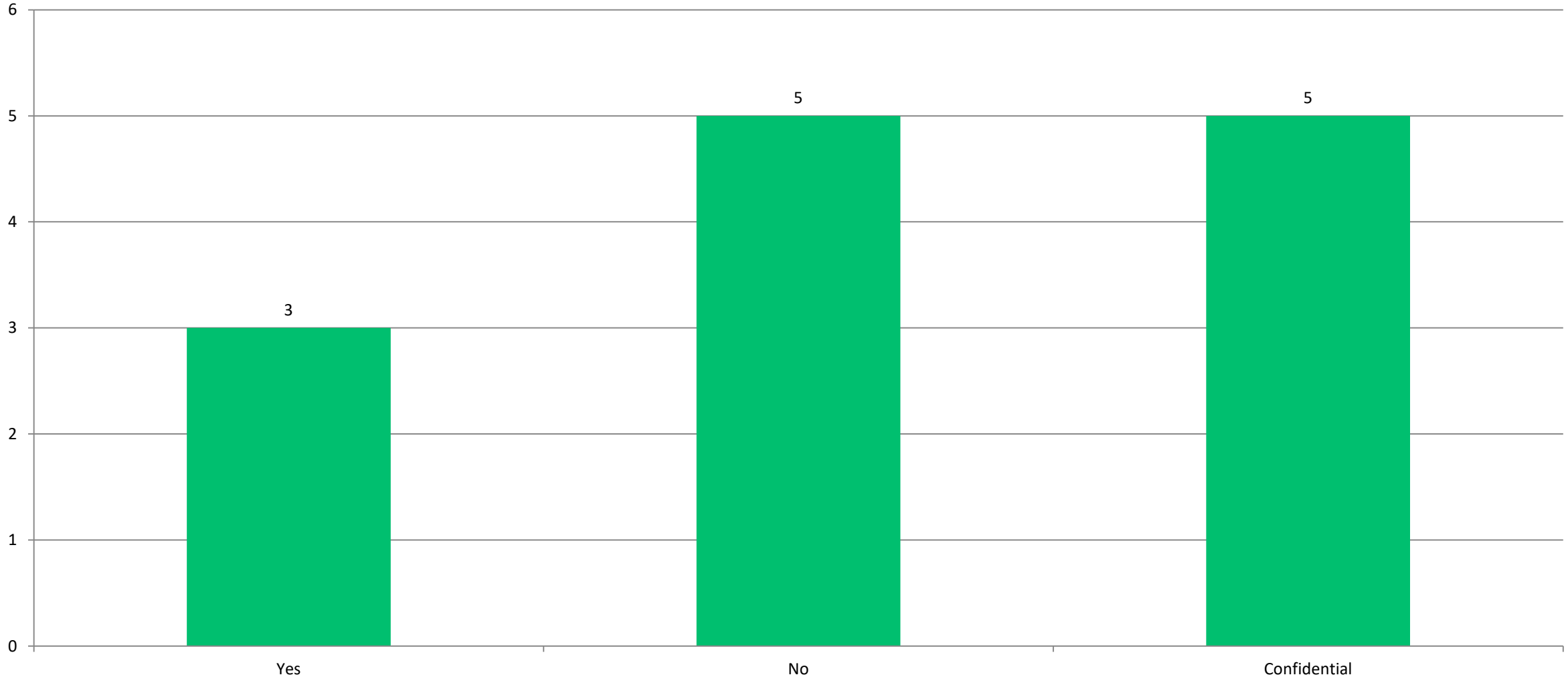
The approved budgets for Columbia are not approved at the measure level.

# Q12) How many smart thermostats do you estimate could be incentivized on an annual basis for Columbia Gas of Ohio's service area?

| Responses | Number of Responses |
|---|---|
| N/A | 4 |
| Varies | 1 |
| Don't Know | 1 |
| Depends on the Incentive | 1 |
| Confidential | 1 |

Columbia has exceeded 11,000 smart thermostats in both 2017 and 2018.

# Q13) Do you verify customer eligibility for your smart thermostat rebate? (Select Only One Response)




Columbia does verify customer eligibility.

# Q14) Who verifies customer eligibility for you?

| Responses | Number of Responses |
|---|---|
| Implementation Vendor | 2 |
| CLEAResult and Enervee | 1 |

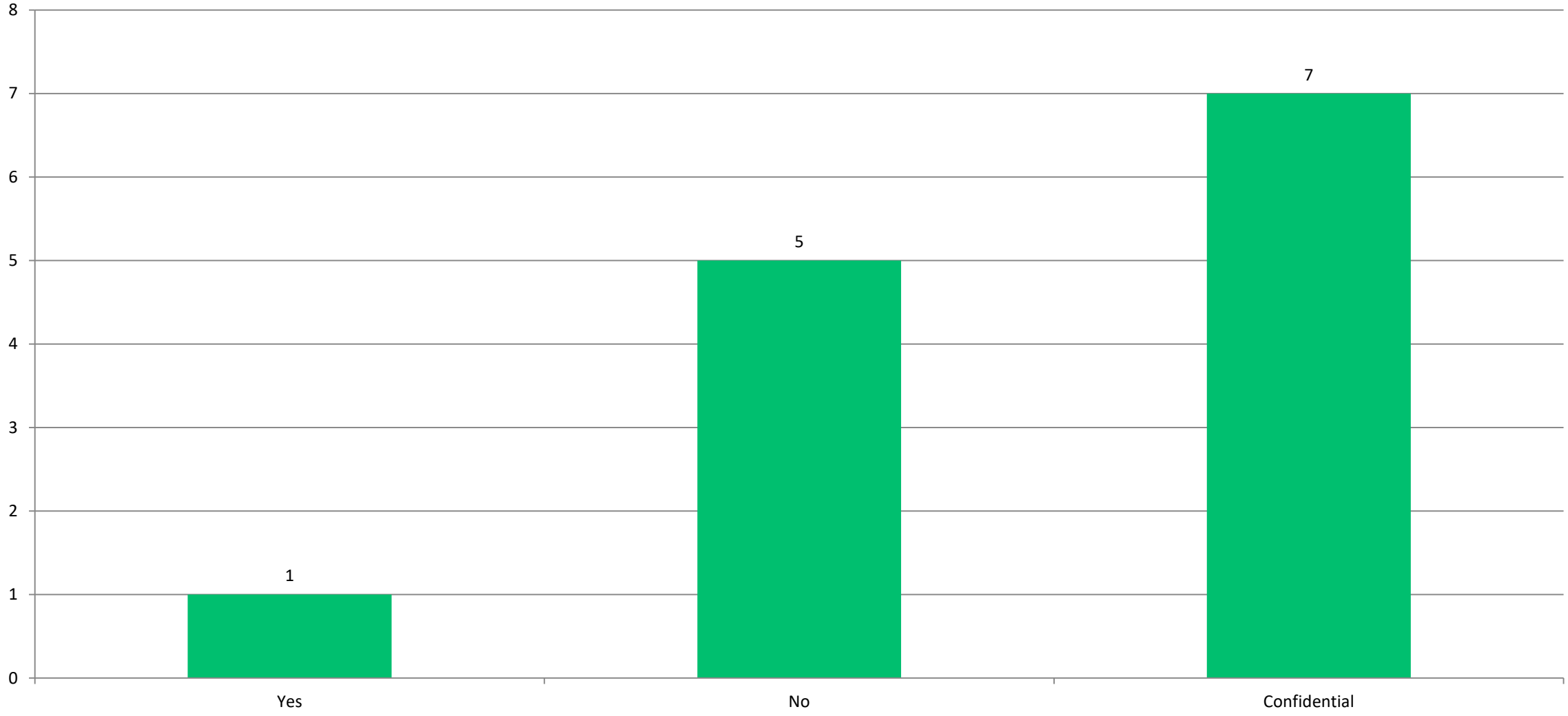
Columbia uses both CLEAResult and Simple Energy to verify customer eligibility.

# Q15) What is the contract term with the third-party vendor(s) that verify customer eligibility?

| Responses | Number of Responses |
|---|---|
| Confidential | 1 |
| 12/31/2020 | 2 |

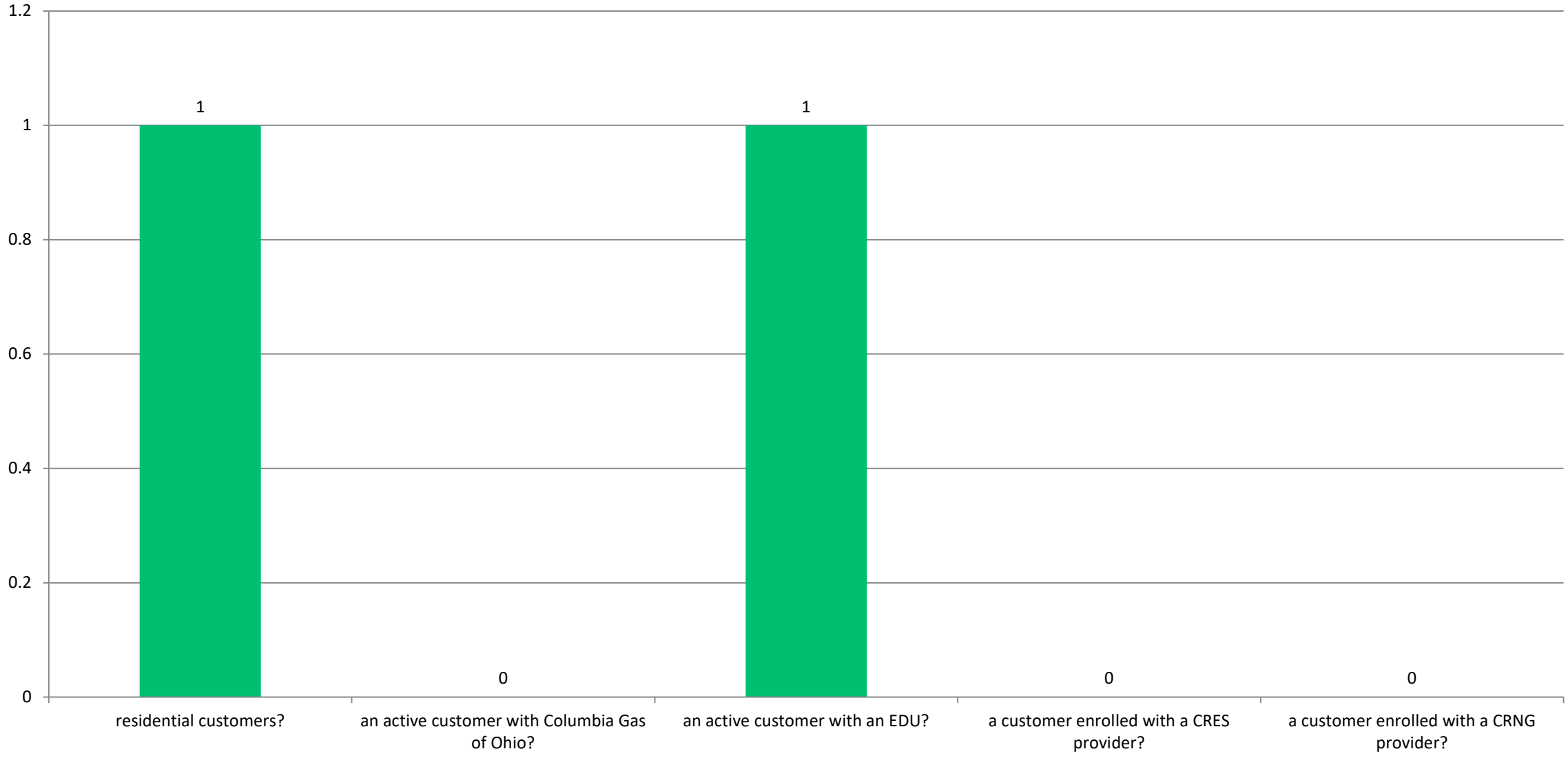
Columbia has contracts which last until 2022.

# Q16) Are there eligibility requirements for a Columbia customer to receive a smart thermostat rebate from you?



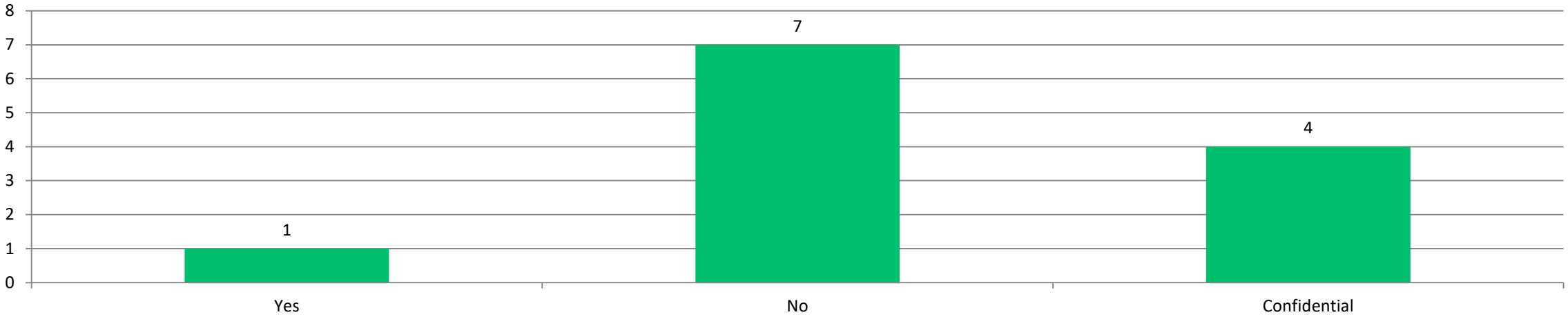

Columbia does have requirements for customer eligibility.

# Q17) Does your organization have eligibility requirements for: (Check if Yes)




Columbia requires that the customer be an active customer at the time of the purchase of their product.

# Q18) Do you require a customer to pay back the rebate for any reason? (Select Only One Response)

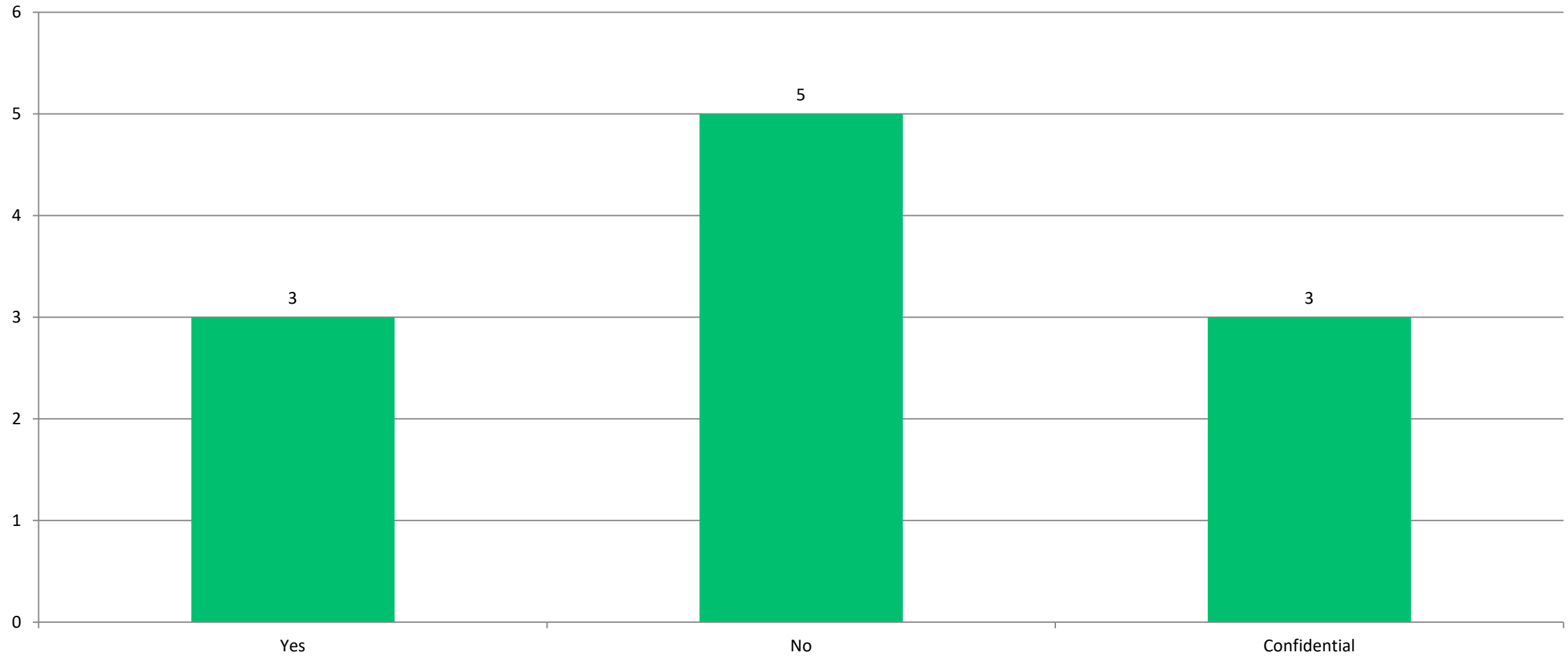



# Q19) What are the requirements for reimbursement?

The only response is:
"When a smart thermostat is purchased through online storefront, rebate is returned in the event the device is returned."

Columbia does not require customers to pay back their rebate.

# Q20) Do you require a customer to abide by any other terms and conditions to receive a smart thermostat rebate? (Select Only One Response)




Columbia does have terms and conditions when receiving rebates.

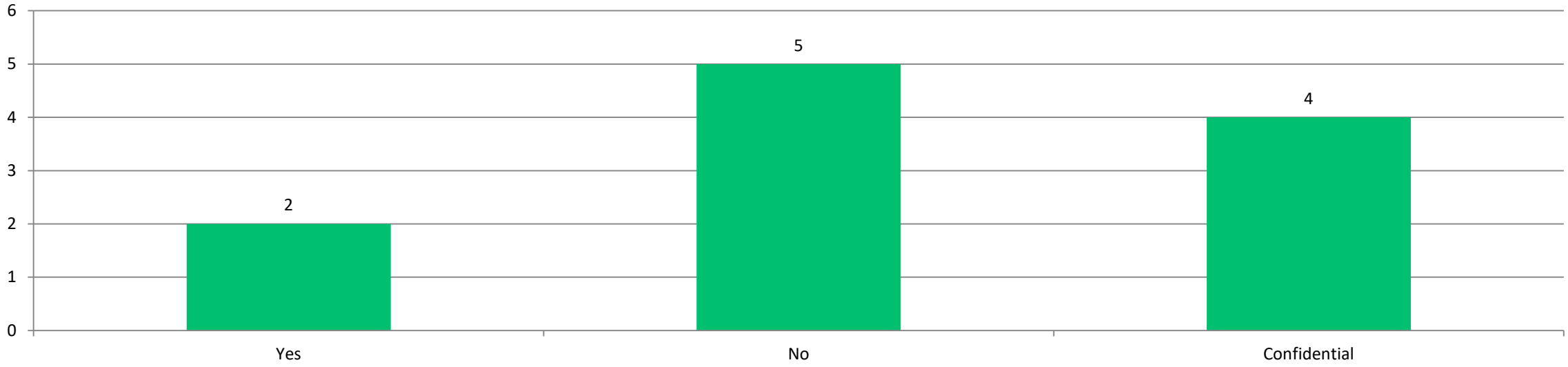
# Q21) What is the contract term with the third-party vendor(s) that verify customer eligibility?

**There are two responses:**

1. Device activation or enrollment with a demand response program. Also enrollment at times with our energy products. Any other program specific restrictions in place behind that utility would also apply.

2. Equipment MUST be installed at an active residential service account.
   - Limit 1 smart thermostat rebate per account per year.
   - MUST be new & ENERGY STAR certified.
   - Rebates valid for purchases between 12/16/2018 – 12/15/2019.
   - Rebate cannot exceed 50% of the purchase price
   - Application(s) must be completed (including a copy of your recent electric bill and the receipt showing model number and purchase price) by 12/15/2019

# Q22) Do you have any restrictions on the number of smart thermostats on which a customer is eligible? (Select Only One Response)




# Q23) Please describe your restrictions on the number of smart thermostats for which a customer is eligible.

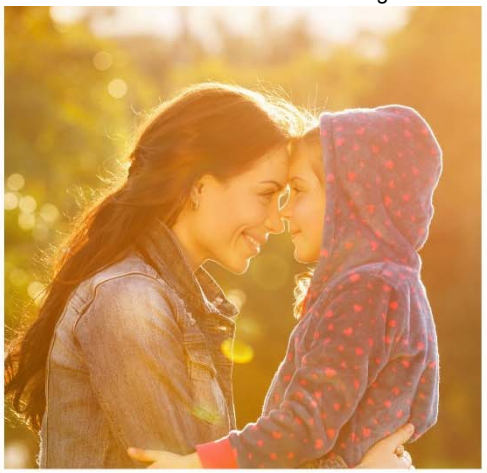
There was only one response to this question:

- 1 per residential account per year

Columbia has a limit of two thermostat rebates per residential customer account over a fifteen year period.

# Q24) Contact Information (Optional)

- **No respondents answered this question.**



# Consolidated Smart Thermostat Rebate Meeting

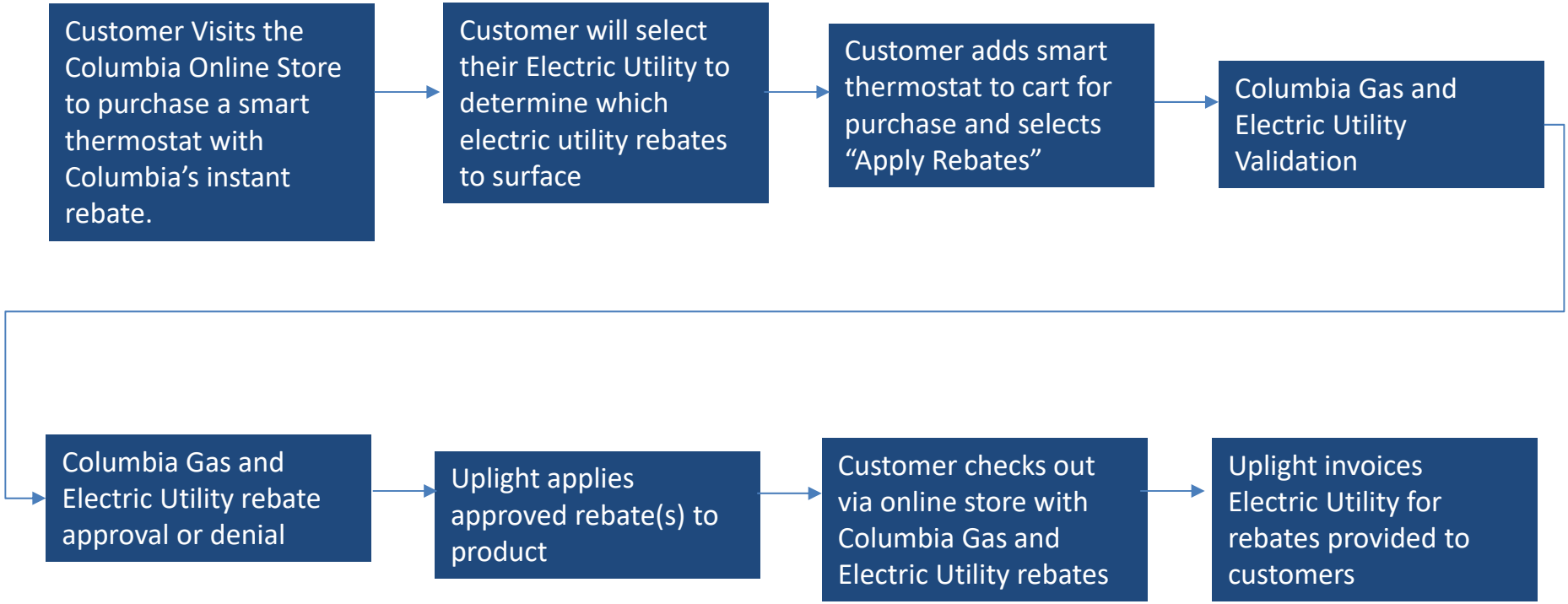
September 18, 2019

Columbia Gas of Ohio
A NiSource Company

# Agenda

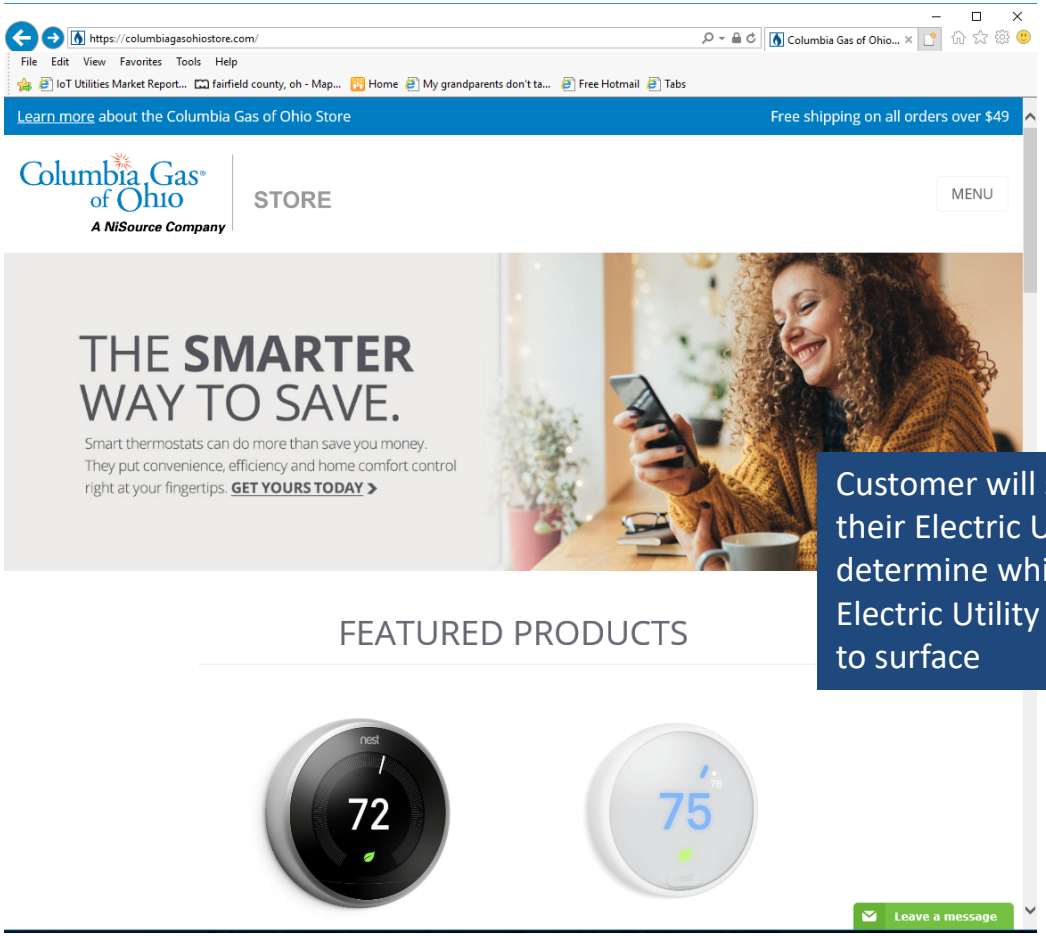
- Introductions
- Draft Electric Utility Consolidated Rebate Process
- Draft CRES/CRNG Consolidated Rebate Process
- Questions/Next Steps

# Draft Consolidated Smart Thermostat Process for Electric Utilities



# Draft Consolidated Smart Thermostat Process for Electric Utilities

Customer Visits the Columbia Online Store to purchase a smart thermostat with Columbia's instant rebate.

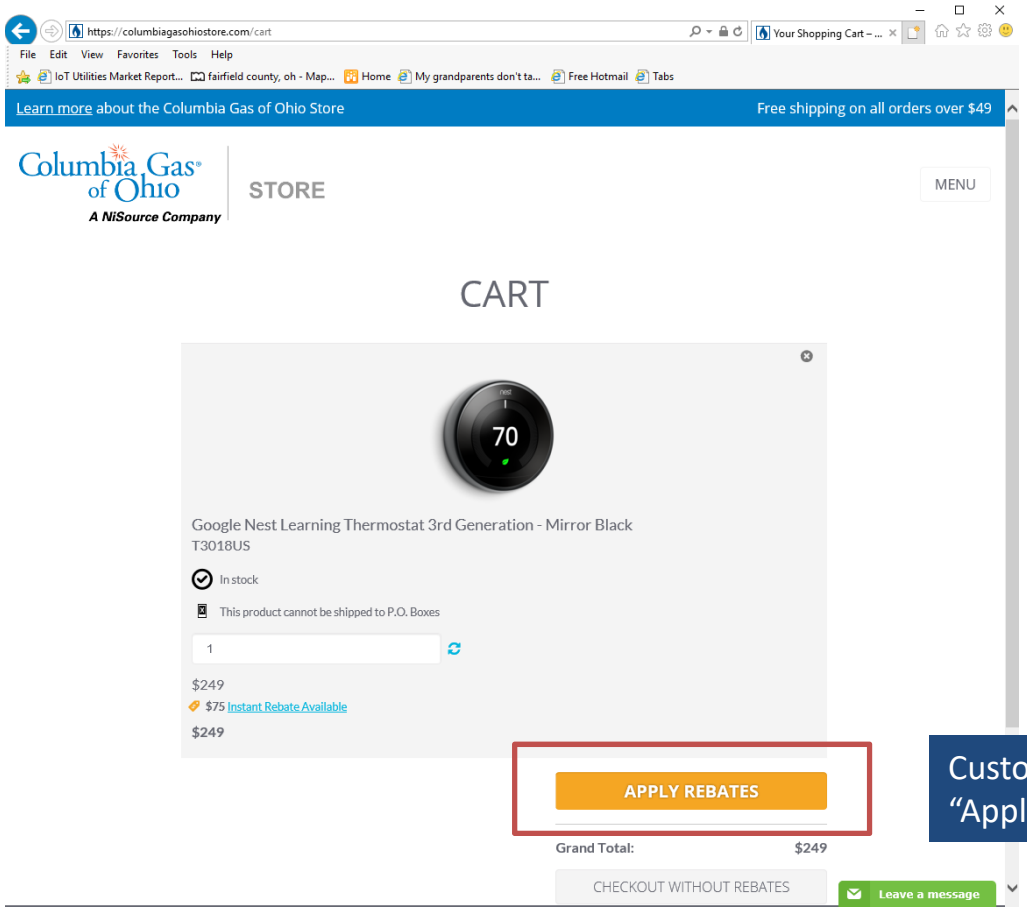



Customer will select their Electric Utility to determine which Electric Utility rebates to surface

Details to develop:
- Need service territories for each Electric Utility.
- Develop initial screen for customers to select their Electric Utility.

# Draft Consolidated Smart Thermostat Process for Electric Utilities

Customer adds smart thermostat to cart for purchase



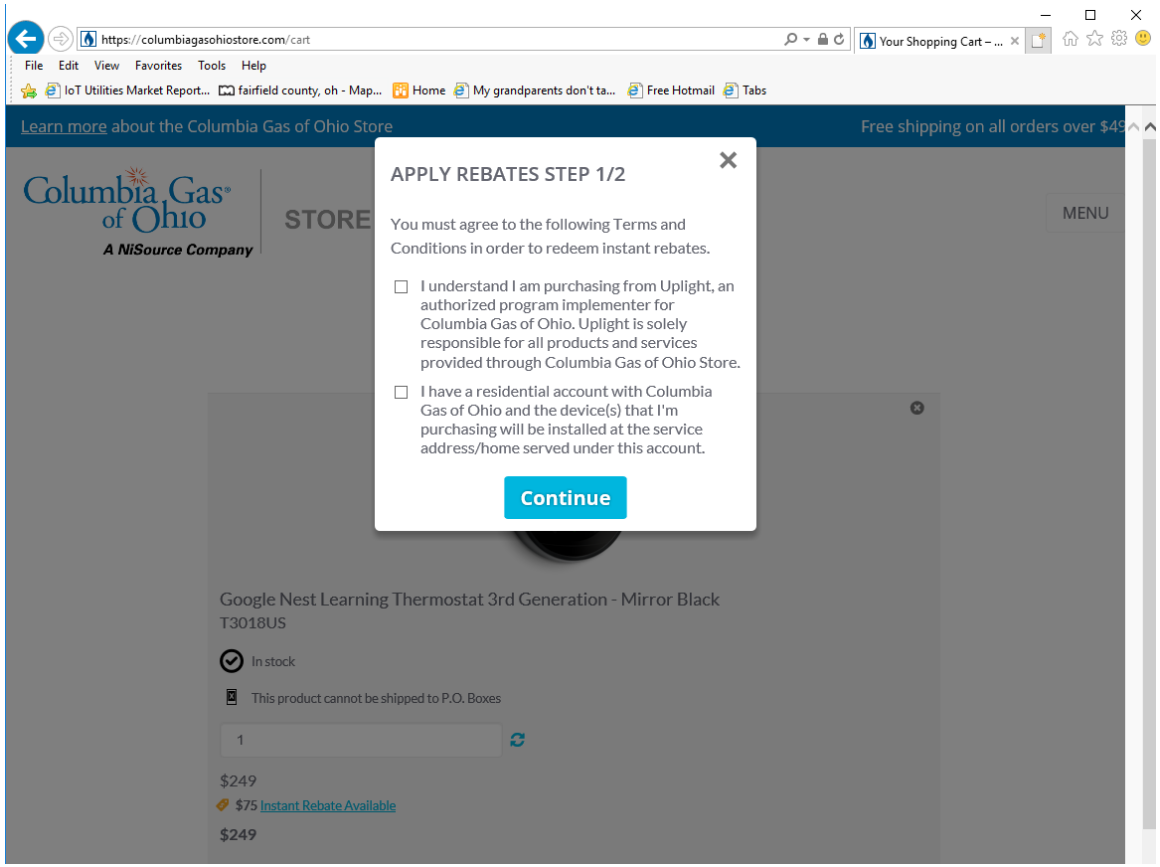

Customer selects "Apply Rebates"

Details to develop:

- Need rebate levels and quantity limits for each Electric Utility and each smart thermostat sold on the online store.
- Method to display both rebates to customers.

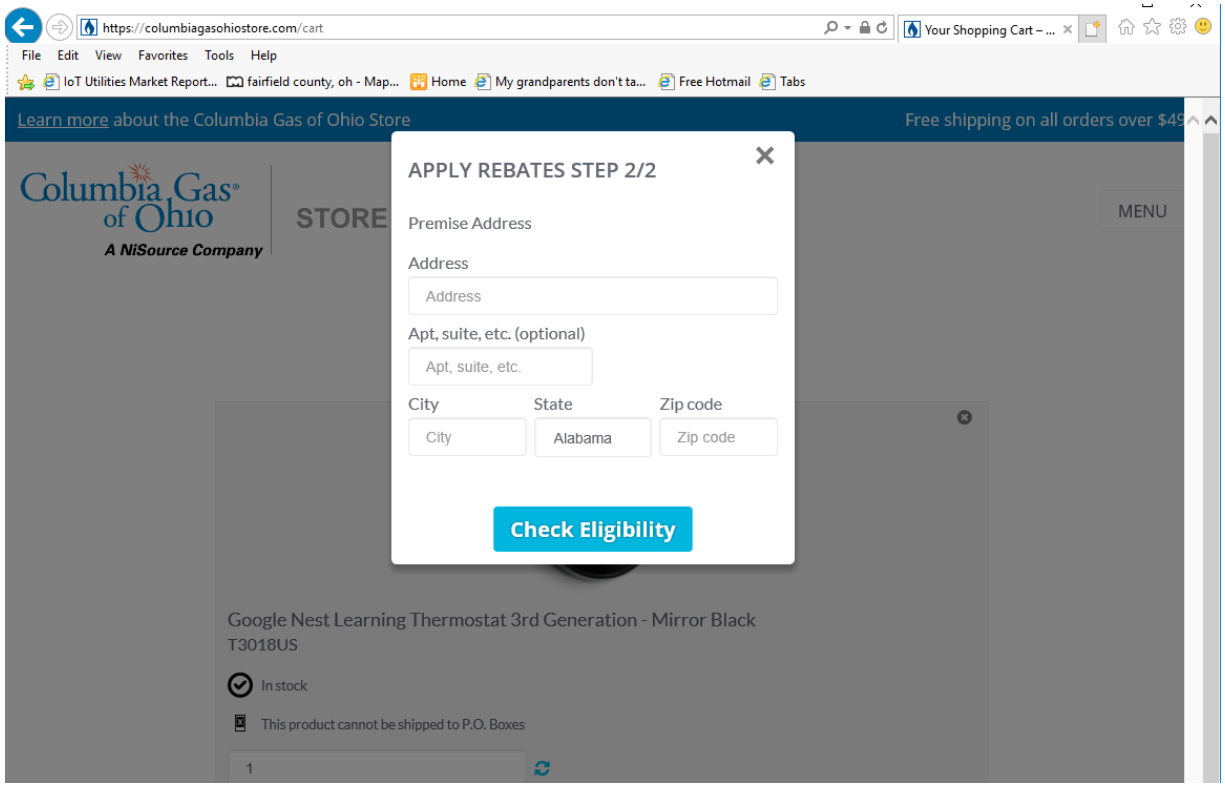
# Draft Consolidated Smart Thermostat Process for Electric Utilities

Columbia Gas and Electric Utility Validation




Details to develop:
- Electric Utility Terms & Conditions

# Draft Consolidated Smart Thermostat Process for Electric Utilities

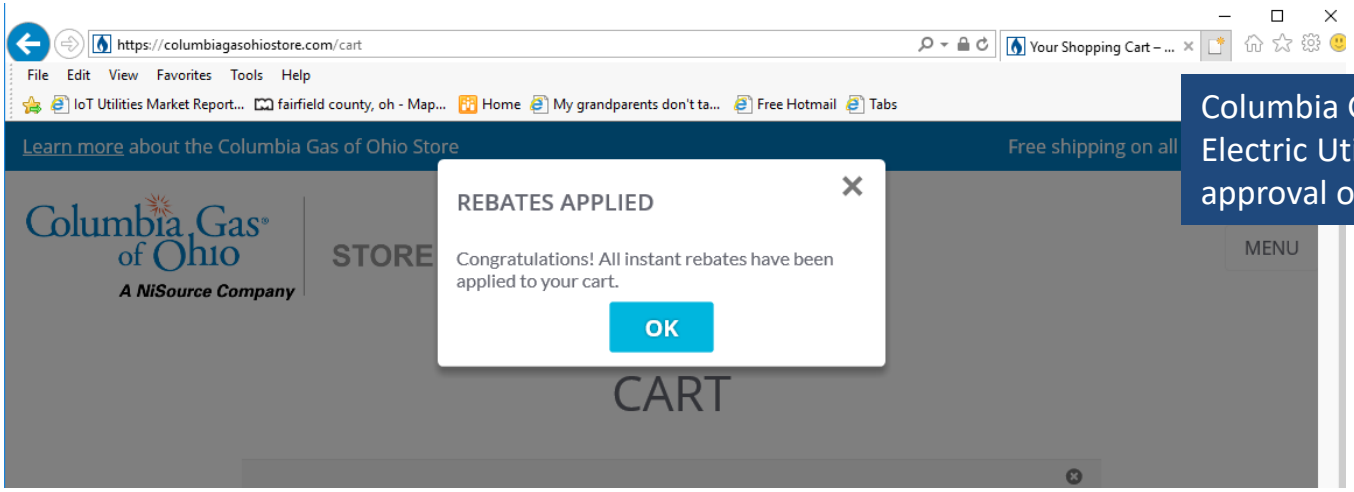



Columbia Gas and Electric Utility Validation

Details to develop:

- Need to determine data sharing and validation criteria for each Electric Utility.
- Process to coordinate applying rebate limits for each Electric Utility.
- What data do Electric Utilities need to receive back?
- Scope Complexity may be impacted by each Electric Utility's requirements.

# Draft Consolidated Smart Thermostat Process for Electric Utilities



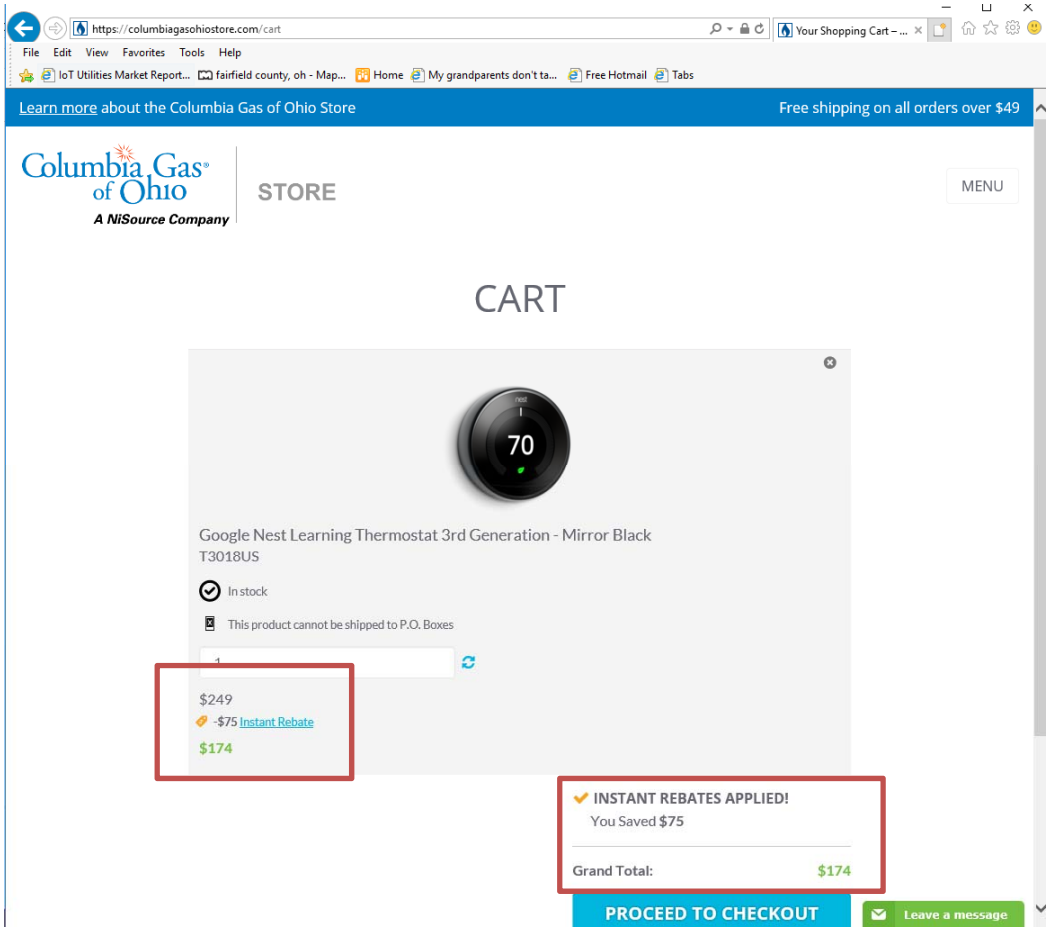

Columbia Gas and Electric Utility rebate approval or denial

Details to develop:

- Develop method to display Columbia Gas and Electric Utility approval or denial and what information will be displayed to the customer.
- Communications process if customers have questions on rebates.

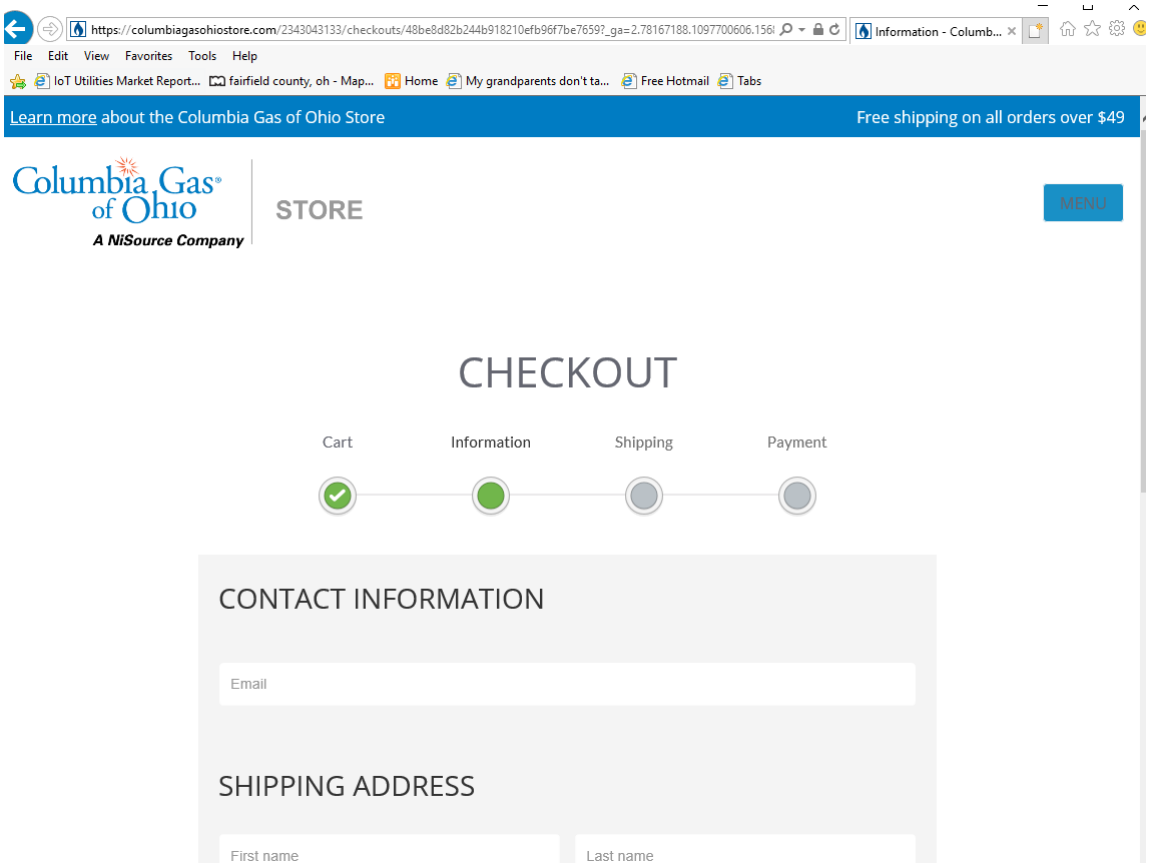
# Draft Consolidated Smart Thermostat Process for Electric Utilities

Uplight applies approved rebate(s) to product

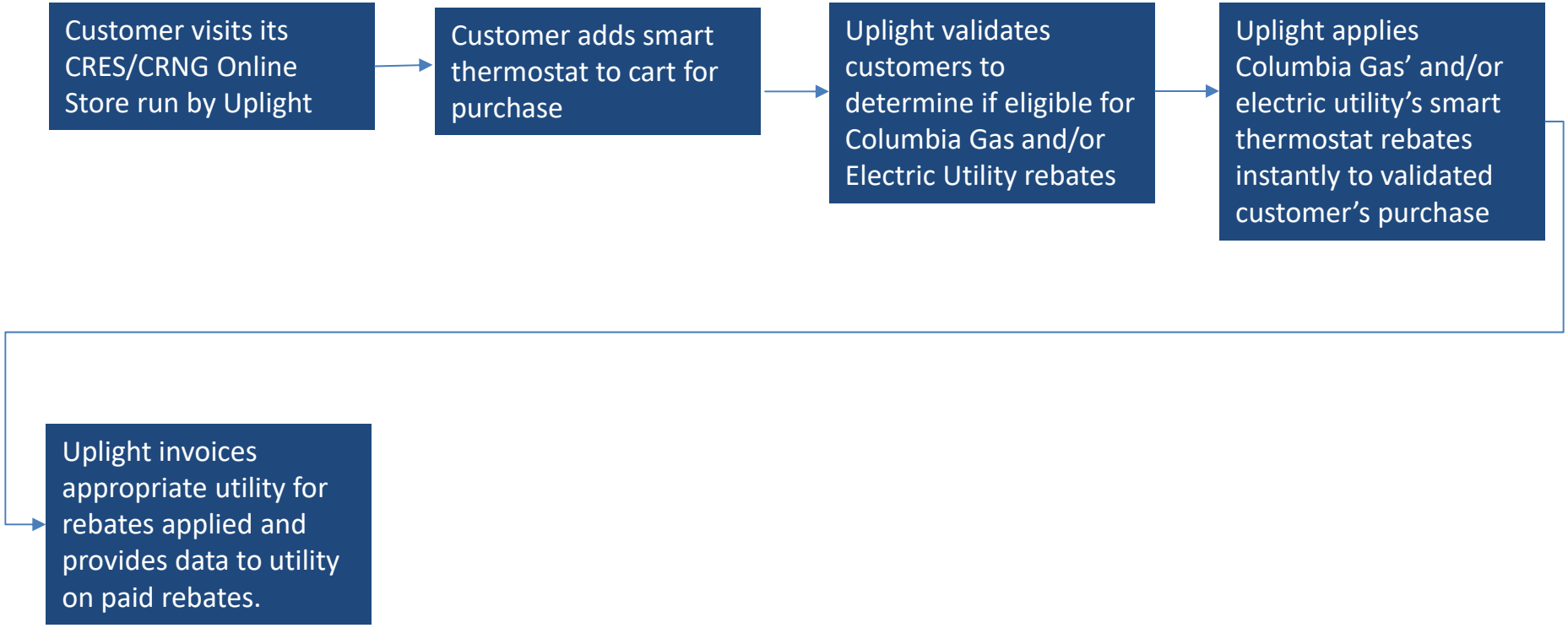


# Draft Consolidated Smart Thermostat Process for Electric Utilities

Customer makes purchase on the Online Store with Columbia Gas and Electric Utility rebates applied instantly

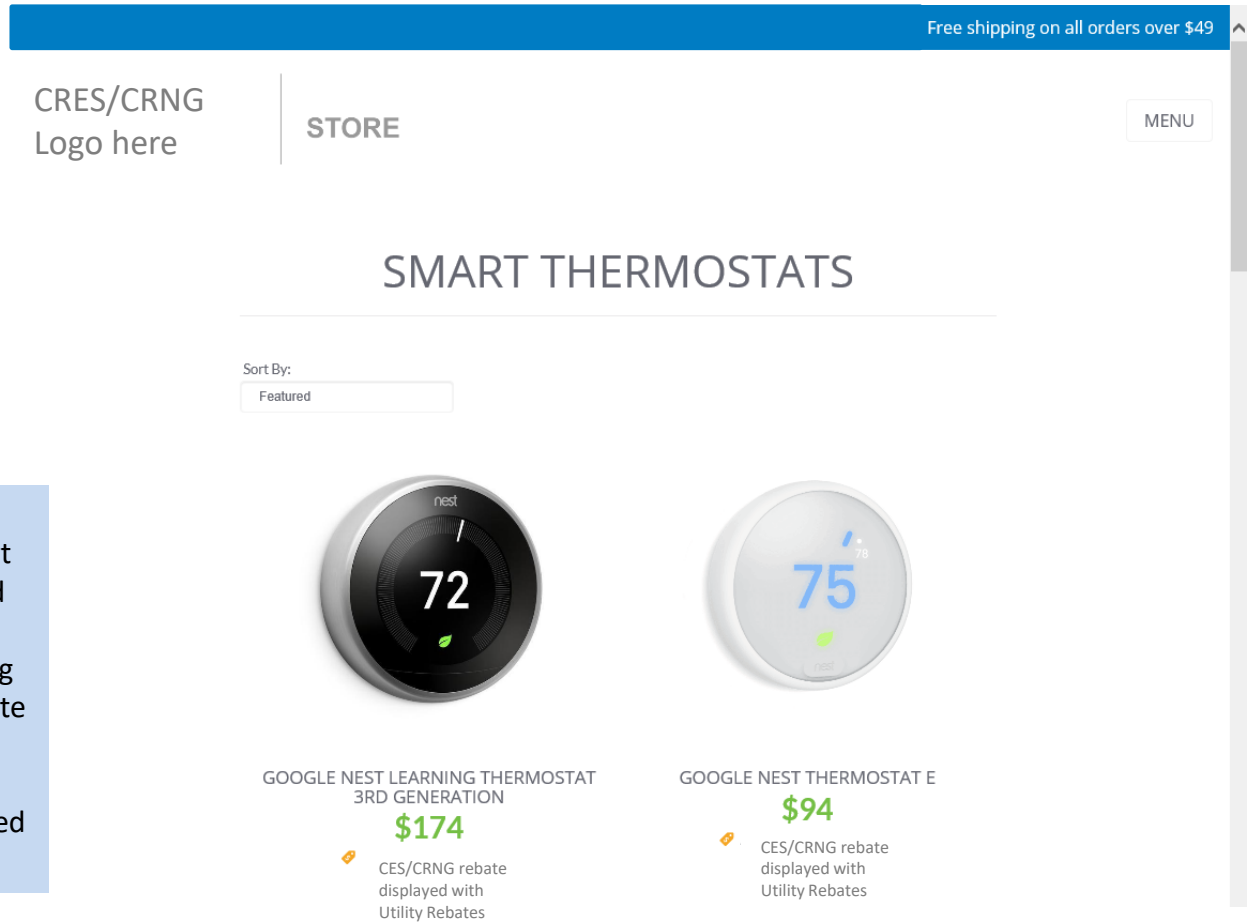


# Draft Consolidated Smart Thermostat Process for CRES/CRNG



# Draft Consolidated Smart Thermostat Process for CRES/CRNG

CRES/CRNG Microsite Example – **Illustrative Example Only**




Details to develop:

- Need each CRES/CRNG smart thermostat rebate levels and quantity limits.
- Develop process for surfacing Columbia Gas and appropriate Electric Utility rebates.
- Estimated quantity of smart thermostats to be incentivized through the site.

# Other Discussion Items

- **Determine Contracting Requirements**
  - Interested parties to establish Licensing Agreements with Uplight
  - Need to determine any other necessary contracts between interested parties
  - Potentially consider NDAs for discussing confidential information and proprietary information

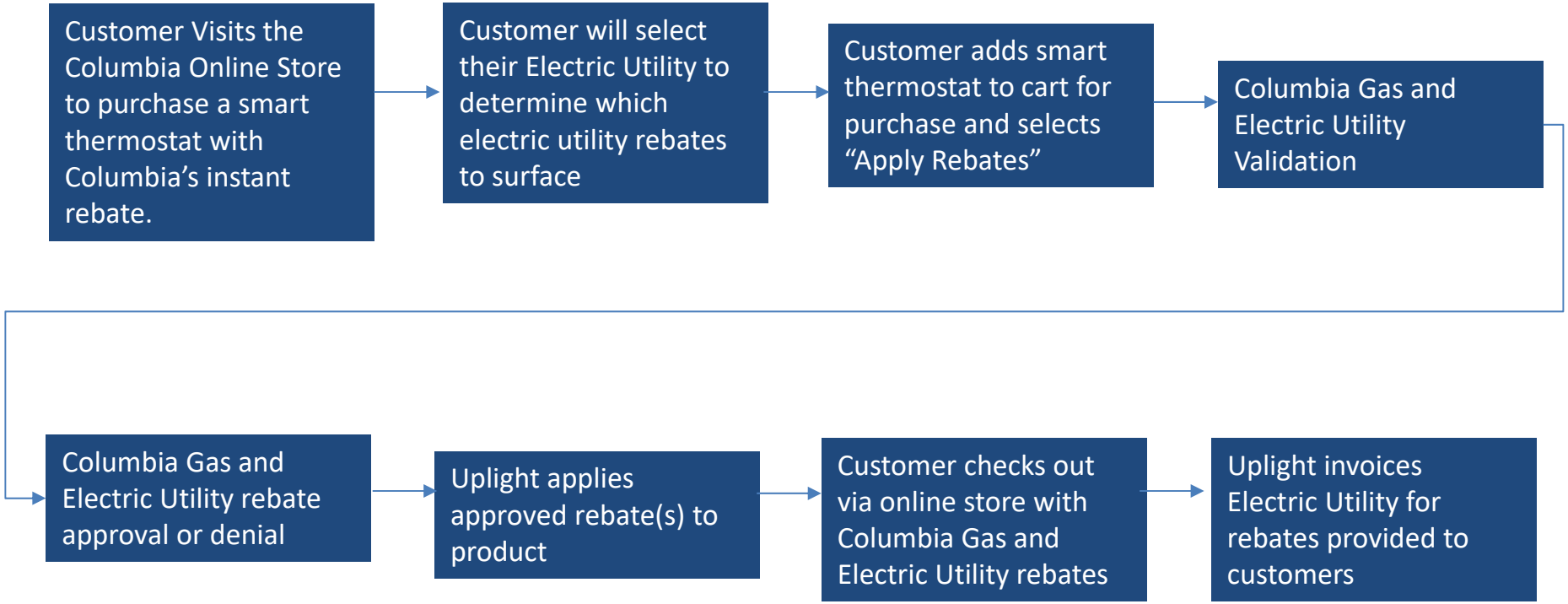
- **Columbia and Uplight Develop Program Specifications and Scope**
  - Share initial program parameters with EDUs and CRES/CRNGs and work to establish agreed upon requirements and willingness and ability to provide data and information in order to bring project to fruition.
  - Understand each party's Terms and Conditions and program requirements
  - Scope is to stack rebates to Columbia Gas customers only
  - Discussion of payment of Uplight and other charges to implement a consolidated smart thermostat rebate process

# Consolidated Smart Thermostat Rebate Meeting

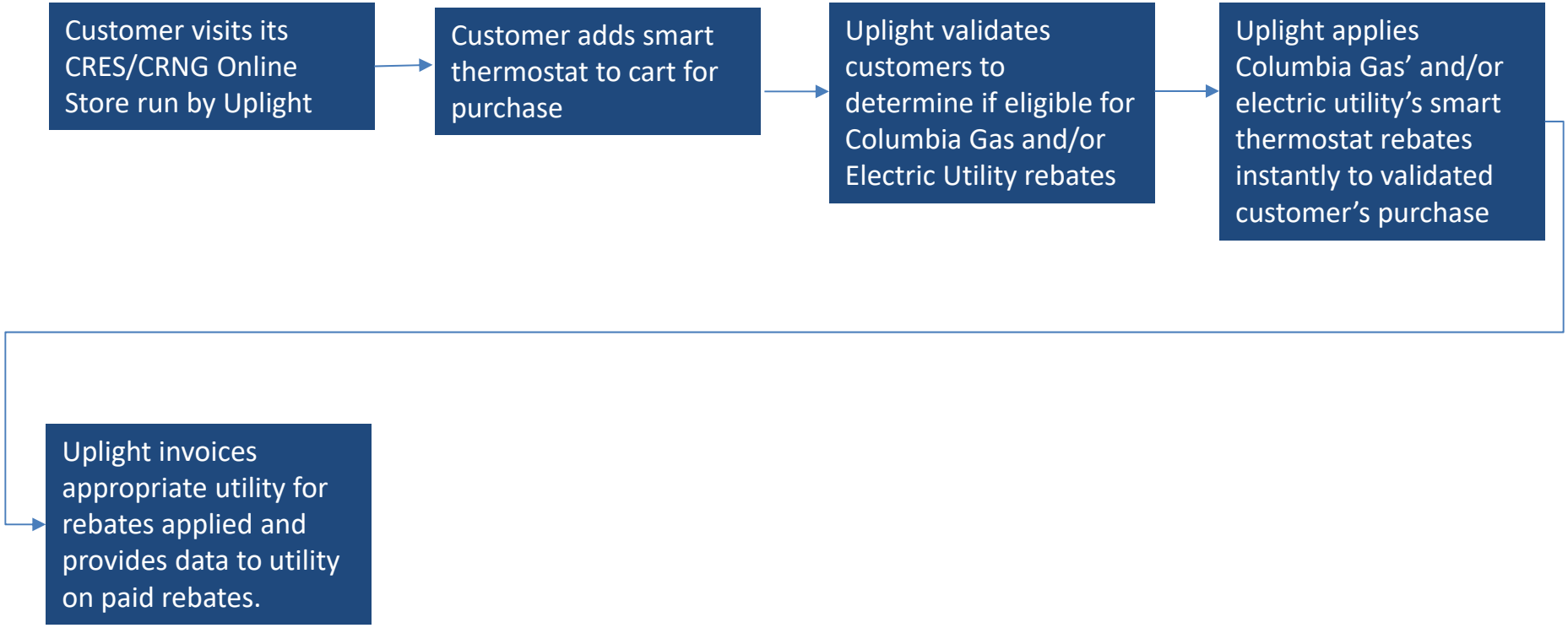
December 10, 2019

Columbia Gas of Ohio
A NiSource Company

# Draft Consolidated Smart Thermostat Process for Electric Utilities

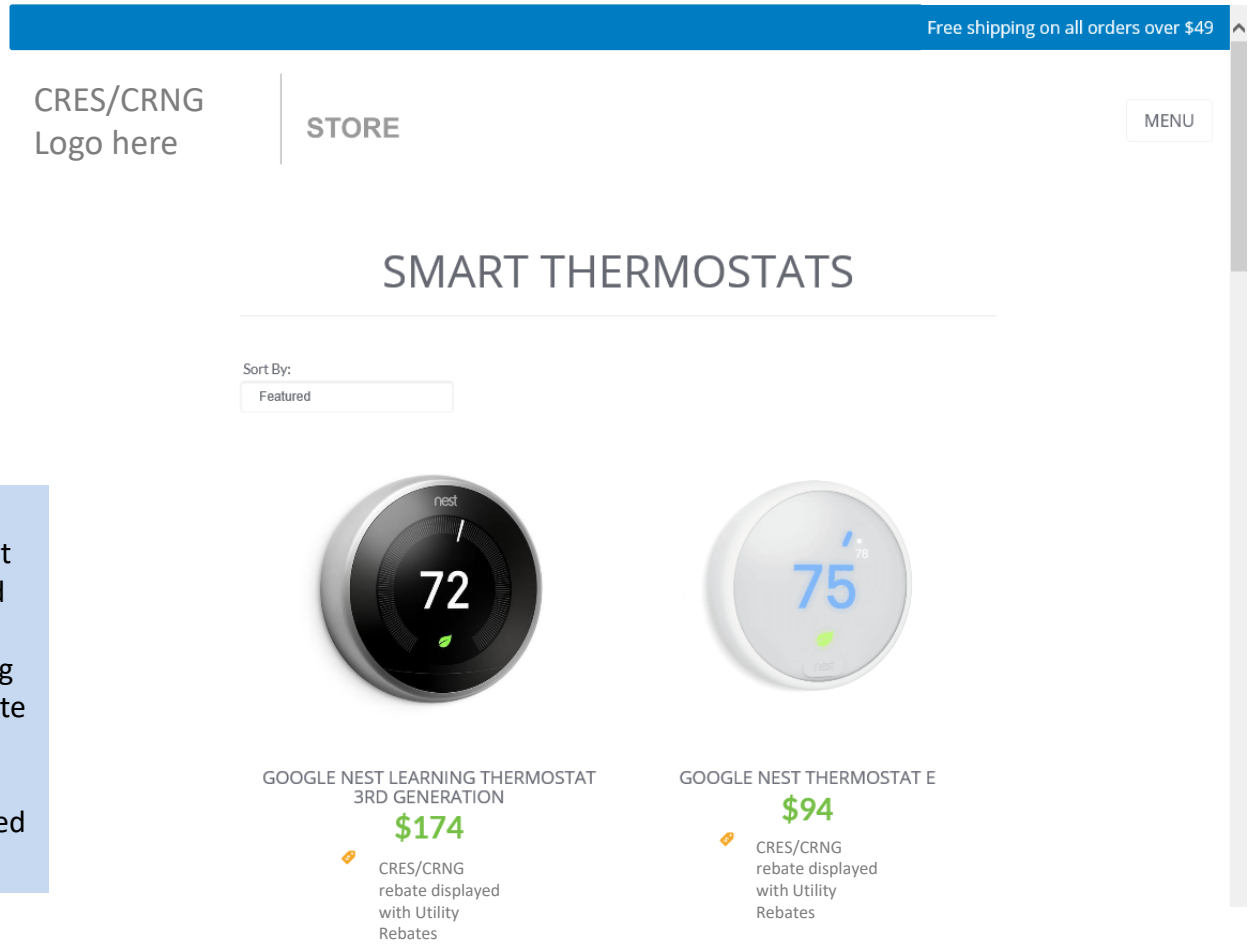


# Draft Consolidated Smart Thermostat Process for CRES/CRNG



# Draft Consolidated Smart Thermostat Process for CRES/CRNG

CRES/CRNG Microsite Example – **Illustrative Example Only**




Details to develop:

- Need each CRES/CRNG smart thermostat rebate levels and quantity limits.
- Develop process for surfacing Columbia Gas and appropriate Electric Utility rebates.
- Estimated quantity of smart thermostats to be incentivized through the site.

PUCO Case No. 19-1940-GA-RDR
ELPC Interrogatory Set 1 No. 2
Respondent: Melissa L. Thompson

**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-2. Please describe Columbia's plan for a joint rebate program, including relevant dates, timelines, and participants in formulating and implementing the plan.

**RESPONSE:**

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1.

A record of all of the participants at each of the consolidated smart thermostat rebate meetings is attached at:

- ELPC Interrogatory Set 1, No. 2 Attachment A (June 10, 2019 Sign-in Sheet)
- ELPC Interrogatory Set 1, No. 2 Attachment B (July 31, 2019 Sign-in Sheet)
- ELPC Interrogatory Set 1, No. 2 Attachment C (September 18, 2019 Sign-in Sheet)
- ELPC Interrogatory Set 1, No. 2 Attachment D (October 23, 2019 Sign-in Sheet)
- ELPC Interrogatory Set 1, No. 2 Attachment E (December 10, 2019 Sign-in Sheet)
- ELPC Interrogatory Set 1, No. 2 Attachment F (March 3, 2020 Sign-in Sheet)

**Sign-In Sheet for Consolidated Smart Thermostat Rebate Meeting**

June 19, 2019

| Name | Organization | Email Address | Phone Number |
|---|---|---|---|
| Melissa Thompson | Columbia Gas of Ohio | mlthompson@nisource.com | 614-460-5542 |
| Christopher Wettle | SPIRE ENERGY | christopher.wettle@spireenergy.com | 937-694-6466 |
| Chris Healey | OCC | christopher.healey@occ | 614-466-9571 |
| Mike Nugent | IGS | michael.nugent@igs.com | 614-659-5065 |
| Larry Gunter | Gilfee | lgunter@law.capital.edu | 540 397 2418 |
| BRIAN DRESSEL | OMAEG | DRESSEL@CARPENTERLIPPS.com | 614-365-4131 |
| JUSTIN DESILETS | HIVE / DIRECT ENERGY | justin.desilets@hivehome.com | (346) 262-5184 |
| Gretchen Petrucci | on behalf of PCSA | gLPetrucci@vorys.com | 614-464-5407 |
| Lindsay Cervenak | NRG | lindsay.cervenak@nrg.com | 267-295-5843 |
| Dana Coulter | NEXTERA | dana.coulter@NEE.com | 832.633.0079 |
| Devin Parram | NOPEC | dparram@bricker.com | 614-227-8813 |

| Name | Organization | Email Address | Phone Number |
|---|---|---|---|
| Jim Ripke | PUCO | | |
| Alla Tempeste | " | | |
| Charles Smith | " | | |
| Zee Motter | " | | |
| Madeline Fleisher | ELPC | mfleisher@elpc.org | 614-569-3827 |
| Robert Kelter | ELPC | rkelter@elpc.org | 312-795-3734 |
| DAVE TABATA | AEP OHIO | dwtabata@aep.com | 614-883-7887 |
| Deanna Gilliland | AEP Ohio | dmgilliland@aep.com | ~~614~~ 740-384-7996 |
| Nicole Williams | FirstEnergy | nwilliams@firstenergycorp.com | 330-384-4532 |
| Ed Miller | FirstEnergy | emiller@firstenergycorp.com | 724-331-2336 |
| Jack Lavelty | COH | | |
| | | | |

On the phone

| Name | Organization | Email Address | Phone Number |
|---|---|---|---|
| Steve Seiple | Columbia Gas of Ohio | sseiple@nisource.com | 614-460-4648 |
| Serj. Berelson | Nest | sberelson@google.com | — |
| Kim Bailey | Tomorrow Energy | kbailey@tomorrowenergy.com | — |
| Shaleen Gupta | Tomorrow Energy | sgupta@tomorrowenergy.com | — |
| Brad Nelson | Vectren Energy | bdnelson@InfiniteEnergy.com | (352) 331-1654, ext. 3317 |
| Jeff Donnelly | SFE Energy | jdonnelly@sfeenergy.com | (905) 366-7020 |
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# COLUMBIA GAS OF OHIO
## SMART THERMOSTAT MEETING
July 31 [redacted] 2019 10:00 am – 12:00 pm
PUCO Offices, 180 E Broad St., Hearing Room 11-[redacted]C

## Sign-In Sheet

| Name | Affiliation | Email Address |
|---|---|---|
| Melissa Thompson | Columbia Gas | mlthompson@nisource.com |
| DAVE TABATA | AEP Ohio | [redacted] dwtabata@aep.com |
| Andrew Metz | Columbia Gas | ametz@nisource.com |
| Joe Clark | Columbia Gas | josephclark@nisource.com |
| Colleen Shutrump | [redacted] OCC | colleen.shutrump@occ.ohio.gov |
| Jim Ripke | PUC | |
| Chris Healey | OCC | |
| Krystina Schaefer | PUCO | krystina.schaefer@puco.ohio.gov |
| JAMES SCHWEITZER | PUCO | JAMES.SCHWEITZER@puco.ohio.gov |
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# COLUMBIA GAS OF OHIO
## SMART THERMOSTAT MEETING
July 31 [redacted], 2019 10:00 am – 12:00 pm
PUCO Offices, 180 E Broad St., Hearing Room 11-[redacted]C

## Sign-In Sheet

| Name | Affiliation | Email Address |
|---|---|---|
| Jack Laverty | Columbia Gas Ohio | jlaverty@nisource.com |
| Christine Rausch | " | crausch@NISource.com |
| Craig Smith | PUCO | |
| email to Melissa to add to the sign in sheet | | |
| Jack Keegan | Just Energy | JKeegan@justenergy.com |
| Zee Molter | PUCO | zee.molter@puco.ohio.com |
| On the Phone: | | |
| Darcy Fabrizius | Constellation | |
| Brian Dressel | OMA EG | |
| Nicole Williams | FE (First Energy) | |
| Ed Miller | First Energy | |
| Dana Coulter | NextEra Energy Services | |
| Jason Garlick | Foster Energy Services LLC | |
| | | |

# COLUMBIA GAS OF OHIO
# CONSOLIDATED SMART THERMOSTAT REBATE MEETING
## SEPTEMBER 18, 2019 10:00 am – 11:00 am
## PUCO Offices, 180 E Broad St., Hearing Room 11-C

### Sign-In Sheet

| Name | Affiliation | Email | Phone Number |
|---|---|---|---|
| Saran Poe | Columbia Gas | spoe@nisource.com | 614-460-4632 |
| Christine Rausch | " " | crausch@NISource.com | 614-460-4630 |
| Andrew Metz | " " | ametz@nisource.com | 614-460-4931 |
| JACK LAVERTY | " " | | 614-460-4714 |
| Melissa Thompson | " " | | 614-460-5942 |
| Jim Ripke | PUCO | you know IT | 614-644-8108 |
| Colleen Shutrump | OCC | " " | 614 ~~93~~ 644-9538 |
| Zee Molter | PUCO | zee.molter@puco.ohio.gov | |
| Alla Tempesta | PUCO | Alla.Magaziner-Tempesta@puco.ohio.gov | |
| Joe Clark | Columbia Gas | josephclark@nisource.com | 614-460-6988 |
| Ed Miller | First Energy | nwilliams@firstenergycorp.com | |
| Nicole Williams | First Energy | | |
| Jason Garlick | Foster Energy Services | | |

# COLUMBIA GAS OF OHIO
## CONSOLIDATED SMART THERMOSTAT REBATE MEETING
## SEPTEMBER 18, 2019 10:00 am – 11:00 am
## PUCO Offices, 180 E Broad St., Hearing Room 11-C

### Sign-In Sheet

| Name | Affiliation | Email | Phone Number |
|---|---|---|---|
| Dale Arnold | Ohio Farm Bureau | darnold@ofbf.org | 614-246-8294 |
| Deanna Gilliland | AEP Ohio | | |
| Steve Seiple | Columbia Gas | sseiple@nisource.com | |
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**Sign-In Sheet for Consolidated Smart Thermostat Rebate Meeting**
October 23, 2019

| Name | Organization | Email Address | Phone Number |
|---|---|---|---|
| Chris Healey | Consumers Counsel | | 614-466-9571 |
| Brenan Riggs | PUCO Staff | brenan.riggs@puco.ohio.gov | |
| Suzanne Williams | PUCO | suzanne.williams@puco.ohio.gov | 614-466-8203 |
| Jack Laverty | Col. Gas | jlaverty@nisource.com | 614 460 4791 |
| Joe Clark | Columbia | josephclark@nisource.com | 614-460-6988 |
| Melissa Thompson | Columbia Gas | mlthompson@nisource.com | 614-460-5542 |
| Christine Rausch | Columbia Gas | crausch@nisource.com | 614-460-4630 |
| Thomas Spottswood | Bricker/NOPEC | jspottswood@bricker.com | |
| Craig Smith | PUCO | craig.smith@puco.ohio.gov | 614-466-2045 |
| Alla Tempesta | " | Alla.Magazinner-Tempesta@puco.ohio.gov | 614-644-5180 |
| Jason Garlick | My Choice Energy | jgarlick@fosteroil.com | 586.248.7184 |

| Name | Organization | Email Address | Phone Number |
|---|---|---|---|
| Dana Coulter | NextEra Energy | dana.coulter@gexaenergy.com | |
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# COLUMBIA GAS OF OHIO
## SMART THERMOSTAT MEETING

**December 10, 2019 10:00 am – 11:00 am**
**PUCO Offices, 180 E Broad St., Room 380**

**Sign-In Sheet**

| Name | Organization | Email address | Phone number |
|---|---|---|---|
| Zee Moiter | PUCO | zee.moiter@puco.ohio.gov | |
| Sarah Poe | Columbia Gas | spoe@nisource.com | 614-460-4632 |
| Alla Tempeste | PUCO | Alla.Nagazne-Tempeste@puco.ohio.gov | – |
| Jim Ripke | PUCO | James.Ripke@puco.ohio.gov | |
| Melissa Thompson | Columbia Gas | mlthompson@nisource.com | 614-460-5542 |
| Joe Clark | Columbia Gas | josephclark@nisource.com | 614-460-6698 |
| Andrew Metz | Columbia Gas | ametz@nisource.com | 614-460-4931 |
| Deanna Gilliland | AEP | dmgilliland@aep.com | 740·384-7996 |
| Devin Parram | | dparram@bricker.com | 614-227-8813 |
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# COLUMBIA GAS OF OHIO
## CONSOLIDATED SMART THERMOSTAT REBATE MEETING
## MARCH 3, 2020 10:00 am – 11:00 am
## PUCO Offices, 180 E Broad St., Conference Room 380

### Sign-In Sheet

| Name | Affiliation | Email | Phone Number |
|---|---|---|---|
| Sarah Poe | Columbia Gas | spoe@nisource.com | 614-460-4632 |
| Christine Rausch | " | crausch@Nisource.com | 614-460-4630 |
| Andrew Metz | " | ametz@nisource.com | 614-460-4931 |
| Alla Magazner-Tempeste | PUCO | Alla.Magazner-Tempeste@PUCO.OHIO.GOV | 614-644-5980 |
| Zee MOLTER | PUCO | zee.molter@puco.ohio.gov | 614-466-7589 |
| GRETCHEN PETRUCCI | RESA COUNSEL | gLPetrucci@vorys.com | 614-464-5407 |
| Jim Ripke | PUCO | you know it | you know it |
| Melissa Thompson | Columbia Gas | mlthompson@nisource.com | 614-460-5542 |
| Jack Laverty | Columbia Gas | jlaverty@nisource.com | 614-460-4774 |
| Joe Clark | Columbia | josephclark@nisource.com | 614-460-6988 |
| Ted Austin | NORAIL Energy | tbustin@noradienergy-us.com | 630-468-7399 |
| Christopher Healey | OU | christopher.healey@ou.ohio.gov | 614-466-9571 |
| | | | |

**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-3. After the PUCO issued its Opinion and Order dated 12/21/2016 in Docket No. 16-1309, when did Columbia Gas first discuss meeting with First Energy to discuss a joint rebate program?

a. When did that first meeting take place?
b. What was the reasoning behind that decision in terms of the timing of the meeting?
c. Please provide whatever description you can of FirstEnergy's response regarding a joint rebate program, including the times and dates of the conversations and emails.

**RESPONSE:**

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1 and ELPC Interrogatory Set 1, No. 2.

For email correspondence with FirstEnergy regarding the consolidated smart thermostat rebate process please see ELPC Interrogatory Set 1, No. 3, Attachment A and ELPC Interrogatory Set 1, No. 3, Attachment B.

**RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19**
Williams, Nicole M to: jlaverty@nisource.com 06/13/2019 02:36 PM
Cc: "mlthompson@nisource.com"

Hi Jack – Yes, Ed's email is emille3@firstenergycorp.com

Thanks,
Nicole

**Nicole Williams | Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 |☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Thursday, June 13, 2019 2:26 PM
**To:** Williams, Nicole M <nwilliams@firstenergycorp.com>
**Cc:** mlthompson@nisource.com
**Subject:** RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19

We'll add you to the meeting invitation. Can you either forward that to Ed, or give me his email address?

Thanks, Nicole!

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

At Columbia Gas of Ohio, we believe saving matters. That's why we provide **energy efficiency programs** and **rebates** that make sure you have a little extra in your wallet. Learn more at ***ColumbiaGasOhio.com/SavingMatters.***

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From: "Williams, Nicole M" <nwilliams@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 06/13/2019 02:09 PM
Subject: RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19

Hi Jack –

I will be attending in person as well as Ed Miller, Manager of Compliance and Development. The date worked out perfectly because we need to be in Columbus on 6/20.

Looking forward to meeting you.

Thanks,
Nicole

**Nicole Williams** | **Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 |☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Thursday, June 13, 2019 1:34 PM
**To:** Williams, Nicole M <nwilliams@firstenergycorp.com>
**Subject:** Fw: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19
**Importance:** High

Hi, Nicole. Lori Swettlen provided me with your contact information.

The PUCO has asked Columbia Gas of Ohio to coordinate smart thermostat rebates with FE and AEPOH, among others, and there is a meeting scheduled at the Commission from 10am-Noon on June 19 in Hearing Room 11-B on this topic. Can you or someone from FE attend? I believe that there will also be a call in number. I'm happy to talk if you'd like to touch base via phone.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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----- Forwarded by John A Laverty/COH/Enterprise on 06/13/2019 01:30 PM -----

From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>

To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 06/13/2019 01:23 PM
Subject: RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19

USE CAUTION: This email was sent from an external source. Think before you click links or open attachments. If suspicious, please forward to security@nisource.com for review.

Hi Jack,
I'm pretty sure I did reply. But here you go, just in case you didn't get it.

Thanks! Lori

Nicole Williams
nwilliams@firstenergycorp.com
Office phone: 330-384-4532

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Thursday, June 13, 2019 11:38 AM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Subject:** [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19
**Importance:** High

Lori,

I'm following up again on a request for a contact for FE's proposed smart thermostat rebates in FE's EE/PDR portfolio as proposed in case 16-0743. The PUCO has asked Columbia Gas of Ohio to coordinate smart thermostat rebates with FE and AEPOH, among others, and there is a meeting scheduled at the Commission from 10am-Noon on June 19 in Hearing Room 11-B on this topic.

Is there a contact within FE that you can provide to me so that I can reach out to the appropriate person?

Thanks so much!

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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**RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19**
Williams, Nicole M to: jlaverty@nisource.com 06/18/2019 10:33 AM
Cc: "mlthompson@nisource.com"

Hi Jack – I never received the invite from anyone at Columbia. Can you please forward?

Thanks,
Nicole

**Nicole Williams | Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 | ☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Thursday, June 13, 2019 3:43 PM
**To:** Williams, Nicole M <nwilliams@firstenergycorp.com>
**Cc:** mlthompson@nisource.com
**Subject:** RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19

Thanks, Nicole!

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Williams, Nicole M" <nwilliams@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "mlthompson@nisource.com" <mlthompson@nisource.com>
Date: 06/13/2019 02:36 PM
Subject: RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19

Hi Jack – Yes, Ed's email is emille3@firstenergycorp.com

Thanks,
Nicole

**Nicole Williams** | **Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 |☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Thursday, June 13, 2019 2:26 PM
**To:** Williams, Nicole M <nwilliams@firstenergycorp.com>
**Cc:** mlthompson@nisource.com
**Subject:** RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19

We'll add you to the meeting invitation. Can you either forward that to Ed, or give me his email address?

Thanks, Nicole!

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Williams, Nicole M" <nwilliams@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 06/13/2019 02:09 PM
Subject: RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19

Hi Jack –

I will be attending in person as well as Ed Miller, Manager of Compliance and Development. The date worked out perfectly because we need to be in Columbus on 6/20.

Looking forward to meeting you.

Thanks,
Nicole

**Nicole Williams** | **Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 |☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Thursday, June 13, 2019 1:34 PM
**To:** Williams, Nicole M <nwilliams@firstenergycorp.com>
**Subject:** Fw: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19
**Importance:** High

Hi, Nicole. Lori Swettlen provided me with your contact information.

The PUCO has asked Columbia Gas of Ohio to coordinate smart thermostat rebates with FE and AEPOH, among others, and there is a meeting scheduled at the Commission from 10am-Noon on June 19 in Hearing Room 11-B on this topic. Can you or someone from FE attend? I believe that there will also be a call in number. I'm happy to talk if you'd like to touch base via phone.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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----- Forwarded by John A Laverty/COH/Enterprise on 06/13/2019 01:30 PM -----

From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 06/13/2019 01:23 PM
Subject: RE: [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19

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Hi Jack,
I'm pretty sure I did reply. But here you go, just in case you didn't get it.

Thanks! Lori

Nicole Williams
nwilliams@firstenergycorp.com
Office phone: 330-384-4532

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Thursday, June 13, 2019 11:38 AM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Subject:** [EXTERNAL] Coordination of Smart Thermostat rebates meeting June 19
**Importance:** High

Lori,

I'm following up again on a request for a contact for FE's proposed smart thermostat rebates in FE's EE/PDR portfolio as proposed in case 16-0743. The PUCO has asked Columbia Gas of Ohio to coordinate smart thermostat rebates with FE and AEPOH, among others, and there is a meeting scheduled at the Commission from 10am-Noon on June 19 in Hearing Room 11-B on this topic.

Is there a contact within FE that you can provide to me so that I can reach out to the appropriate person?

Thanks so much!

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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**RE: [EXTERNAL] Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate) - Follow up Email**

Williams, Nicole M to: mlthompson@nisource.com 06/27/2019 01:52 PM
Cc: "Miller, Edward C"

History: This message has been replied to.

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Hi Marissa,

It was nice meeting you at the meeting last week. FirstEnergy has no edits or changes to the survey.

We look forward to working with you through this process.

Thanks,
Nicole

**Nicole Williams** | **Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 | ☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Thursday, June 20, 2019 8:38 PM
**To:** Tamara.Turkenton@puco.ohio.gov; Zee.Molter@puco.ohio.gov; Dorothy.Bremer@puco.ohio.gov; Barbara.Bossart@puco.ohio.gov; suzanne.williams@puco.ohio.gov; james.ripke@puco.ohio.gov; Swettlen, Lori M <lswettl@firstenergycorp.com>; DWTABATA@AEP.COM; dmgilliland@aep.com; amilam@ofbf.org; bojko@carpenterlipps.com; cendsley@ofbf.org; christopher.healey@occ.ohio.gov; cmooney@ohiopartners.org; dborchers@bricker.com; glpetrucci@vorys.com; ibatikov@vorys.com; john.jones@ohioattorneygeneral.gov; joliker@igsnergy.com; lcurtis@ofbf.org; lesliekovacik@toledo.oh.gov; mfleisher@elpc.org; Miller, Edward C <emille3@firstenergycorp.com>; Williams, Nicole M <nwilliams@firstenergycorp.com>; Settineri, Michael J. <mjsettineri@vorys.com>; Amy Milam <amilam@ofbf.org>; Chad Endsley <cendsley@ofbf.org>; Dale Arnold <darnold@ofbf.org>; Leah Curtis <lcurtis@ofbf.org>; dparram@bricker.com; Dave Rinebolt <drinebolt@opae.org>; alla.tempesta@puco.ohio.gov; craig.smith@puco.ohio.gov
**Cc:** sseiple@nisource.com; JosephClark@nisource.com; jlaverty@nisource.com; spoe@nisource.com; ametz@nisource.com; CRausch@nisource.com
**Subject:** [EXTERNAL] Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate) - Follow up Email

Good evening,
Thank you to everyone who attended yesterday's kick-off meeting. We know you all have very busy schedules, and truly appreciate you all setting aside time to talk through the Commission's directives.

To follow up our meeting, we are asking for you edits or changes to our draft survey, which is attached, by next Friday, June 28.

Thereafter, we will distribute the final survey electronically for your review the first week of July. We are asking for your responses to this survey by July 19.

Our next meeting will be on Wednesday, July 31 at 10:00 am in Hearing Room 11-C at the PUCO's Offices (180 East Broad Street, Columbus, Ohio). We will be reviewing the survey responses.

For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

Thank you all for your participation, and have a wonderful weekend!

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

----- Forwarded by Melissa L Thompson/NCS/Enterprise on 06/20/2019 08:18 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, bojko@carpenterlipps.com, cendsley@ofbf.org, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org, emille3@firstenergycorp.com, nwilliams@firstenergycorp.com, "Settineri, Michael J." <mjsettineri@vorys.com>, Amy Milam <amilam@ofbf.org>, Chad Endsley <cendsley@ofbf.org>, Dale Arnold <darnold@ofbf.org>, Leah Curtis <lcurtis@ofbf.org>,
Cc: sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE
Date: 06/18/2019 12:57 PM
Subject: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate)

Good afternoon,
On behalf of Columbia Gas of Ohio, attached is our agenda for the meeting tomorrow morning at 10:00 am in Hearing Room 11-B at the PUCO's Offices (180 East Broad Street, Columbus, Ohio).

We will have a dial-in for the meeting. Please use:

1-855-481-1480

Passcode: 276250

For the meeting, we will be discussing a survey for all participants to take to after the meeting to understand how all EDUs, CRES, and CRNG suppliers. The survey is attached for your review.

Thank you all for your participation tomorrow.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

----- Forwarded by Melissa L Thompson/NCS/Enterprise on 06/11/2019 02:31 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, Andrew Metz/COH/Enterprise@NISOURCE, bojko@carpenterlipps.com, callwein@keglerbrown.com, cendsley@ofbf.org, Cheryl MacDonald/NCS/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org,
Cc: sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE
Date: 05/31/2019 10:17 PM
Subject: Fw: Save the Date: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate)

Good evening,
On behalf of Columbia Gas of Ohio, you are cordially invited to a meeting on Wednesday, June 19 at 10:00 am in Hearing Room 11-B at the PUCO's Offices (180 East Broad Street, Columbus, Ohio).

At this meeting, we will discuss the potential implementation of a consolidated smart thermostat rebate process for customers in Columbia Gas of Ohio's service area. Columbia will be distributing an agenda closer to this introductory meeting to guide our conversation regarding the potential partnership with electric distribution utilities, CRES and CRNG suppliers that operate within Columbia Gas of Ohio's service area.

We anticipate this kick off meeting will the first in a series of meetings to discuss the intricacies of developing a consolidated smart thermostat rebate process with Columbia's customers that may have overlapping eligibility with some of the EDU, CRES, and CRNG suppliers' programs.

Thank you in advance for attending this meeting, sorry for the confusion regarding the date, and we look

forward to seeing you then.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

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## RE: [EXTERNAL] Consolidated Smart Thermostat Rebate Process Survey Results

Williams, Nicole M to: mlthompson@nisource.com 07/31/2019 10:24 AM

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Hi Melissa,

Just an FYI that Ed Miller & Nicole Williams from FirstEnergy were on the phone. I'm not sure if you took attendance on the phone prior to 10am.

Thanks,
Nicole

**Nicole Williams** | **Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 | ☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Tuesday, July 30, 2019 4:02 PM
**To:** alla.tempesta@puco.ohio.gov; ametz@nisource.com; amilam@ofbf.org; Barbara.Bossart@puco.ohio.gov; bojko@carpenterlipps.com; cendsley@ofbf.org; CRausch@nisource.com; christopher.healey@occ.ohio.gov; cmooney@ohiopartners.org; Colleen.Shutrump@occ.ohio.gov; craig.smith@puco.ohio.gov; Dale Arnold <darnold@ofbf.org>; dborchers@bricker.com; dmgilliland@aep.com; Dorothy.Bremer@puco.ohio.gov; dparram@bricker.com; Dave Rinebolt <drinebolt@opae.org>; DWTABATA@AEP.COM; Miller, Edward C <emille3@firstenergycorp.com>; glpetrucci@vorys.com; ibatikov@vorys.com; james.ripke@puco.ohio.gov; jlaverty@nisource.com; john.jones@ohioattorneygeneral.gov; joliker@igsnergy.com; JosephClark@nisource.com; lcurtis@ofbf.org; lesliekovacik@toledo.oh.gov; Swettlen, Lori M <lswettl@firstenergycorp.com>; mfleisher@elpc.org; Settineri, Michael J. <mjsettineri@vorys.com>; Williams, Nicole M <nwilliams@firstenergycorp.com>; spoe@nisource.com; sseiple@nisource.com; suzanne.williams@puco.ohio.gov; Tamara.Turkenton@puco.ohio.gov; Zee.Molter@puco.ohio.gov
**Subject:** [EXTERNAL] Consolidated Smart Thermostat Rebate Process Survey Results

Good afternoon,
We look forward to seeing everyone tomorrow at 10:00 am in Hearing Room 11-C at the PUCO's Offices (180 East Broad Street, Columbus, Ohio). For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

Tomorrow we will be reviewing the survey results. In advance of this meeting, please see the survey results attached for your review.

Thank you all for your participation, and we look forward to seeing you soon!

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

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**Phone Attendees: Consolidated Smart Thermostat Rebate Process Meeting - Wednesday, September 18**

Williams, Nicole M to: mlthompson@nisource.com 09/18/2019 10:04 AM
Cc: "Miller, Edward C"

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Hi Melissa –

Ed Miller and Nicole Williams from FirstEnergy are on the line.

**Nicole Williams** | **Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 | ☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Monday, September 16, 2019 4:07 PM
**To:** alla.tempesta@puco.ohio.gov; ametz@nisource.com; amilam@ofbf.org; Barbara.Bossart@puco.ohio.gov; bojko@carpenterlipps.com; cendsley@ofbf.org; CRausch@nisource.com; christopher.healey@occ.ohio.gov; cmooney@ohiopartners.org; Colleen.Shutrump@occ.ohio.gov; craig.smith@puco.ohio.gov; Dale Arnold <darnold@ofbf.org>; dborchers@bricker.com; dmgilliland@aep.com; Dorothy.Bremer@puco.ohio.gov; dparram@bricker.com; Dave Rinebolt <drinebolt@opae.org>; DWTABATA@AEP.COM; Miller, Edward C <emille3@firstenergycorp.com>; glpetrucci@vorys.com; ibatikov@vorys.com; james.ripke@puco.ohio.gov; jlaverty@nisource.com; john.jones@ohioattorneygeneral.gov; joliker@igsnergy.com; JosephClark@nisource.com; lcurtis@ofbf.org; lesliekovacik@toledo.oh.gov; Swettlen, Lori M <lswettl@firstenergycorp.com>; mfleisher@elpc.org; Settineri, Michael J. <mjsettineri@vorys.com>; Williams, Nicole M <nwilliams@firstenergycorp.com>; spoe@nisource.com; sseiple@nisource.com; suzanne.williams@puco.ohio.gov; Tamara.Turkenton@puco.ohio.gov; Zee.Molter@puco.ohio.gov
**Subject:** [EXTERNAL] Consolidated Smart Thermostat Rebate Process Meeting - Wednesday, September 18

Good afternoon,
We are looking forward to seeing everyone this Wednesday, September 18, at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers. The presentation showing this high-level structure is attached below.

Thank you all for your continued participation, and we will see you soon.

Best regards,

Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

From: Melissa L Thompson/NCS/Enterprise
To: alla.tempesta@puco.ohio.gov, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 08/05/2019 09:08 PM
Subject: Consolidated Smart Thermostat Rebate Process - Next Meeting, September 18

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Good evening,
Thank you to everyone who attended, in person or by phone, last week's Consolidated Smart Thermostat Rebate Process Meeting. Attached, is an electronic copy of the sign-in sheet from that meeting.

We have scheduled our next meeting for Wednesday, September 18 at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers.

Thank you all for your participation, and we look forward to seeing you soon!

Best regards,
Melissa

[attachment "Sign-in Sheet.pdf" deleted by Melissa L Thompson/NCS/Enterprise]

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

---

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**Re: [EXTERNAL] Re: Next Consolidated Smart Thermostat Rebate Process Meeting - Tomorrow, Wednesday, October 23**

Williams, Nicole M to: mlthompson@nisource.com 10/22/2019 11:41 PM
Cc: "Miller, Edward C"

History: This message has been replied to and forwarded.

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Melissa,

Ed and I are unable to attend the meeting tomorrow. Due to HB6, FirstEnergy will not be moving forward with the consolidated smart thermostat rebate process. At this time, we do not feel it is prudent to spend the dollars or resources to start a program that will end by the end of 2020. While we are not moving forward with the consolidated rebate process, we are able and willing to put links to Columbia's gas rebates on our website where our smart thermostat rebate will reside and would like to talk to you about doing the same for FirstEnergy rebates.

We thank you for holding these meetings and spending the time to prepare this process. If anything changes with the legislation, we're open to revisiting the discussion.

Thank you,
Nicole

---

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Tuesday, October 22, 2019 3:33:00 PM
**To:** Alla.Magaziner-Tempesta@puco.ohio.gov <Alla.Magaziner-Tempesta@puco.ohio.gov>; ametz@nisource.com <ametz@nisource.com>; amilam@ofbf.org <amilam@ofbf.org>; Barbara.Bossart@puco.ohio.gov <Barbara.Bossart@puco.ohio.gov>; bojko@carpenterlipps.com <bojko@carpenterlipps.com>; cendsley@ofbf.org <cendsley@ofbf.org>; CRausch@nisource.com <CRausch@nisource.com>; christopher.healey@occ.ohio.gov <christopher.healey@occ.ohio.gov>; cmooney@ohiopartners.org <cmooney@ohiopartners.org>; Colleen.Shutrump@occ.ohio.gov <Colleen.Shutrump@occ.ohio.gov>; craig.smith@puco.ohio.gov <craig.smith@puco.ohio.gov>; Dale Arnold <darnold@ofbf.org>; dborchers@bricker.com <dborchers@bricker.com>; dmgilliland@aep.com <dmgilliland@aep.com>; Dorothy.Bremer@puco.ohio.gov <Dorothy.Bremer@puco.ohio.gov>; dparram@bricker.com <dparram@bricker.com>; Dave Rinebolt <drinebolt@opae.org>; DWTABATA@AEP.COM <DWTABATA@AEP.COM>; Miller, Edward C <emille3@firstenergycorp.com>; glpetrucci@vorys.com <glpetrucci@vorys.com>; ibatikov@vorys.com <ibatikov@vorys.com>; james.ripke@puco.ohio.gov <james.ripke@puco.ohio.gov>; jlaverty@nisource.com <jlaverty@nisource.com>; john.jones@ohioattorneygeneral.gov <john.jones@ohioattorneygeneral.gov>; joliker@igsnergy.com <joliker@igsnergy.com>; JosephClark@nisource.com <JosephClark@nisource.com>; lcurtis@ofbf.org <lcurtis@ofbf.org>; lesliekovacik@toledo.oh.gov <lesliekovacik@toledo.oh.gov>; Swettlen, Lori M <lswettl@firstenergycorp.com>; mfleisher@elpc.org <mfleisher@elpc.org>; Settineri, Michael J. <mjsettineri@vorys.com>; Williams, Nicole M <nwilliams@firstenergycorp.com>; spoe@nisource.com

<spoe@nisource.com>; sseiple@nisource.com <sseiple@nisource.com>; suzanne.williams@puco.ohio.gov <suzanne.williams@puco.ohio.gov>; Tamara.Turkenton@puco.ohio.gov <Tamara.Turkenton@puco.ohio.gov>; Zee.Molter@puco.ohio.gov <Zee.Molter@puco.ohio.gov>
**Subject:** [EXTERNAL] Re: Next Consolidated Smart Thermostat Rebate Process Meeting - Tomorrow, Wednesday, October 23

Good afternoon,
We look forward to seeing everyone tomorrow at the next Columbia Gas of Ohio Consolidated Smart Thermostat Rebate Process Meeting. We will be meeting tomorrow at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we anticipate receiving your feedback on the high level structure presented by Columbia at the last meeting. Columbia's smart thermostat contractor, Uplight, will also walk through a presentation, which can be accessed at the following link during the meeting:
https://zoom.us/j/5183667147

Thanks everyone for your continued participation, and we look forward to seeing you tomorrow.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

----- Forwarded by Melissa L Thompson/NCS/Enterprise on 10/22/2019 03:26 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 09/20/2019 06:29 PM

Subject: Next Consolidated Smart Thermostat Rebate Process Meeting - Wednesday, October 23

Good afternoon,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting this past Wednesday. For your convenience, I've attached the presentation and the sign-in sheet from that meeting.

Our next meeting will be on Wednesday, October 23 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

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Passcode: 276250

At this meeting, we anticipate receiving your feedback on the high level structure presented by Columbia. Columbia's smart thermostat contractor, Uplight, will also walk through a presentation.

Thanks everyone for your continued participation, and we look forward to seeing you in October.

Best regards,
Melissa

Melissa L. Thompson
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**RE: [EXTERNAL] Re: Next Consolidated Smart Thermostat Rebate Process Meeting - Tomorrow, Wednesday, October 23**

Williams, Nicole M to: mlthompson@nisource.com 10/23/2019 08:54 AM
Cc: "Miller, Edward C"

History: This message has been replied to.

Hi Melissa,

My schedule has changed and I will be able to attend this mornings meeting. I can convey the message.

Thank you,
Nicole

**Nicole Williams** | **Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 | ☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Wednesday, October 23, 2019 8:01 AM
**To:** Williams, Nicole M <nwilliams@firstenergycorp.com>
**Cc:** Miller, Edward C <emille3@firstenergycorp.com>
**Subject:** Re: [EXTERNAL] Re: Next Consolidated Smart Thermostat Rebate Process Meeting - Tomorrow, Wednesday, October 23

Nicole,
I appreciate you reaching out regarding the meeting and this process. Is this a message you would like me to deliver to Staff and the meeting invites at this morning's meeting?

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

From: "Williams, Nicole M" <nwilliams@firstenergycorp.com>
To: "mlthompson@nisource.com" <mlthompson@nisource.com>,
Cc: "Miller, Edward C" <emille3@firstenergycorp.com>
Date: 10/22/2019 11:41 PM
Subject: Re: [EXTERNAL] Re: Next Consolidated Smart Thermostat Rebate Process Meeting - Tomorrow, Wednesday, October 23

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Melissa,

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We thank you for holding these meetings and spending the time to prepare this process. If anything changes with the legislation, we're open to revisiting the discussion.

Thank you,
Nicole

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**Sent:** Tuesday, October 22, 2019 3:33:00 PM
**To:** Alla.Magaziner-Tempesta@puco.ohio.gov <Alla.Magaziner-Tempesta@puco.ohio.gov>; ametz@nisource.com <ametz@nisource.com>; amilam@ofbf.org <amilam@ofbf.org>; Barbara.Bossart@puco.ohio.gov <Barbara.Bossart@puco.ohio.gov>; bojko@carpenterlipps.com <bojko@carpenterlipps.com>; cendsley@ofbf.org <cendsley@ofbf.org>; CRausch@nisource.com <CRausch@nisource.com>; christopher.healey@occ.ohio.gov <christopher.healey@occ.ohio.gov>; cmooney@ohiopartners.org <cmooney@ohiopartners.org>; Colleen.Shutrump@occ.ohio.gov <Colleen.Shutrump@occ.ohio.gov>; craig.smith@puco.ohio.gov <craig.smith@puco.ohio.gov>; Dale Arnold <darnold@ofbf.org>; dborchers@bricker.com <dborchers@bricker.com>; dmgilliland@aep.com <dmgilliland@aep.com>; Dorothy.Bremer@puco.ohio.gov <Dorothy.Bremer@puco.ohio.gov>; dparram@bricker.com <dparram@bricker.com>; Dave Rinebolt <drinebolt@opae.org>; DWTABATA@AEP.COM <DWTABATA@AEP.COM>; Miller, Edward C <emille3@firstenergycorp.com>; glpetrucci@vorys.com <glpetrucci@vorys.com>; ibatikov@vorys.com <ibatikov@vorys.com>; james.ripke@puco.ohio.gov <james.ripke@puco.ohio.gov>; jlaverty@nisource.com <jlaverty@nisource.com>; john.jones@ohioattorneygeneral.gov <john.jones@ohioattorneygeneral.gov>; joliker@igsnergy.com <joliker@igsnergy.com>; JosephClark@nisource.com <JosephClark@nisource.com>; lcurtis@ofbf.org <lcurtis@ofbf.org>; lesliekovacik@toledo.oh.gov <lesliekovacik@toledo.oh.gov>; Swettlen, Lori M <lswettl@firstenergycorp.com>; mfleisher@elpc.org <mfleisher@elpc.org>; Settineri, Michael J. <mjsettineri@vorys.com>; Williams, Nicole M <nwilliams@firstenergycorp.com>; spoe@nisource.com <spoe@nisource.com>; sseiple@nisource.com <sseiple@nisource.com>; suzanne.williams@puco.ohio.gov <suzanne.williams@puco.ohio.gov>; Tamara.Turkenton@puco.ohio.gov <Tamara.Turkenton@puco.ohio.gov>; Zee.Molter@puco.ohio.gov <Zee.Molter@puco.ohio.gov>
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To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
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**RE: [EXTERNAL] Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)**

Williams, Nicole M to: mlthompson@nisource.com 01/13/2020 11:16 AM
Cc: "Miller, Edward C"

USE CAUTION: This email was sent from an external source. Think before you click links or open attachments. If suspicious, please forward to security@nisource.com for review.

Hi Melissa,

Based on HB6 and the status of programs for 2020 the FirstEnergy Companies will not be moving forward with the consolidated rebate process.

Thanks,
Nicole

**Nicole Williams** | **Manager, Energy Efficiency, Residential Programs | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 | ☎: 330.384.4532 | ✉: nwilliams@firstenergycorp.com

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Monday, January 13, 2020 11:03 AM
**To:** Alla.Magaziner-Tempesta@puco.ohio.gov; ametz@nisource.com; amilam@ofbf.org; Barbara.Bossart@puco.ohio.gov; bojko@carpenterlipps.com; cendsley@ofbf.org; CRausch@nisource.com; christopher.healey@occ.ohio.gov; cmooney@ohiopartners.org; Colleen.Shutrump@occ.ohio.gov; craig.smith@puco.ohio.gov; Dale Arnold <darnold@ofbf.org>; dborchers@bricker.com; dmgilliland@aep.com; Dorothy.Bremer@puco.ohio.gov; dparram@bricker.com; Dave Rinebolt <drinebolt@opae.org>; DWTABATA@AEP.COM; Miller, Edward C <emille3@firstenergycorp.com>; glpetrucci@vorys.com; ibatikov@vorys.com; james.ripke@puco.ohio.gov; jlaverty@nisource.com; john.jones@ohioattorneygeneral.gov; joliker@igsnergy.com; JosephClark@nisource.com; Spottswood, Jhay <JSpottswood@bricker.com>; lcurtis@ofbf.org; lesliekovacik@toledo.oh.gov; Swettlen, Lori M <lswettl@firstenergycorp.com>; mfleisher@elpc.org; Settineri, Michael J. <mjsettineri@vorys.com>; Williams, Nicole M <nwilliams@firstenergycorp.com>; spoe@nisource.com; sseiple@nisource.com; suzanne.williams@puco.ohio.gov; Tamara.Turkenton@puco.ohio.gov; Zee.Molter@puco.ohio.gov
**Subject:** [EXTERNAL] Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

Good morning,
I wanted to send a follow-up note requesting your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020**.

Thanks everyone for your participation in this process.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy

Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
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Date: 12/10/2019 08:41 PM
Subject: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

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Good evening,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting today. For your convenience, I've attached the sign-in sheet from today's meeting.

Our next meeting will be on Tuesday, March 3, 2020 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will review the responses from the electric, CRES, and CRNG suppliers as to each company's interest in the consolidated smart thermostat rebate process. We will also review any next steps.

Importantly, Columbia is requesting your response of your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020.**

Thanks everyone for your continued participation, have a safe and wonderful holiday, and we will see you in the new year!

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

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**RE: [EXTERNAL] Re: Slides for Columbia**

John A Laverty to: Swettlen, Lori M 04/10/2019 09:19 AM
Cc: "Andrea.White@clearesult.com", "spoe@nisource.com"

1 attachment

Laverty_John.vcf

Lori, do you have any time frame for when you would like to connect?

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "Andrea.White@clearesult.com" <Andrea.White@clearesult.com>, "spoe@nisource.com" <spoe@nisource.com>
Date: 04/10/2019 08:46 AM
Subject: RE: [EXTERNAL] Re: Slides for Columbia

I was just talking about you yesterday! Yes, we want to circle back and work on a coordinated effort.

Thank you,
Lori

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Tuesday, April 9, 2019 4:37 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** Andrea.White@clearesult.com; spoe@nisource.com
**Subject:** RE: [EXTERNAL] Re: Slides for Columbia

Good afternoon, Lori.

I thought I'd check back in to see if there is an opportunity to get together to continue our discussions about partnering in the area of home energy audits, and also furthering a discussion about coordinating our individual smart thermostat rebates for customers of Columbia Gas who are also First Energy electric customers. Is there an opportunity to meet this month or next?

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 240 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "spoe@nisource.com" <spoe@nisource.com>, "Andrea.White@clearesult.com" <Andrea.White@clearesult.com>
Date: 12/19/2018 08:52 AM
Subject: RE: [EXTERNAL] Re: Slides for Columbia

Good morning!

Things have been a bit busy around here. We will circle back with you after the beginning of the year.

Thank you.

*Lori M. Swettlen*
*Program Manager, Residential Energy Efficiency Programs*
*800 Cabin Hill Drive*
*Greensburg, PA 15601*
*Internal: 350-5641*
*External: 724-830-5641*

*Happy Holidays!*

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Friday, October 26, 2018 12:47 PM
**To:** jlaverty@nisource.com
**Cc:** Swettlen, Lori M <lswettl@firstenergycorp.com>; spoe@nisource.com; Andrea.White@clearesult.com
**Subject:** RE: [EXTERNAL] Re: Slides for Columbia

Sorry, please ignore my last email. It is indeed 12/6 that we are looking at for a meeting date. We also might be able to do 11/29.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: John A Laverty/COH/Enterprise
To: John A Laverty/COH/Enterprise@NISOURCE,
Cc: "Swettlen, Lori M" <lswettl@firstenergycorp.com>, Sarah Poe/COH/Enterprise@NISOURCE, Andrea.White@clearesult.com
Date: 10/26/2018 12:44 PM

Subject: RE: [EXTERNAL] Re: Slides for Columbia

Lori, I meant 11/6. Thinking to far ahead today.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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[attachment "Laverty_John.vcf" deleted by John A Laverty/COH/Enterprise]

From: John A Laverty/COH/Enterprise
To: "Swettlen, Lori M" <lswettl@firstenergycorp.com>,
Cc: Sarah Poe/COH/Enterprise@NiSource, Andrea.White@clearesult.com
Date: 10/26/2018 12:41 PM
Subject: RE: [EXTERNAL] Re: Slides for Columbia

Lori,

Sarah Poe and I from Columbia Gas and Andrea White from CLEAResult are available on 12/6. Might that work?

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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[attachment "Laverty_John.vcf" deleted by John A Laverty/COH/Enterprise]

From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 10/23/2018 01:07 PM
Subject: RE: [EXTERNAL] Re: Slides for Columbia

Good morning,

How are you? Great to hear from you.

We have a meeting scheduled with our internal folks on Nov. 12th. So, we would be happy to meet after that.

Let me know some dates after that we can get together.

Thank you,

*Lori M. Swettlen*
*Program Manager, Residential Energy Efficiency Programs*
*800 Cabin Hill Drive*
*Greensburg, PA 15601*
*Internal: 350-5641*
*External: 724-830-5641*

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Tuesday, October 16, 2018 11:15 AM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Subject:** [EXTERNAL] Re: Slides for Columbia

Lori, thanks for getting this to us. Our schedules are starting to free up again. is there a time/date over the next 2-3 weeks that might work to meet to continue our discussions?

Best,

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 09/04/2018 10:33 AM
Subject: Slides for Columbia

USE CAUTION: This email was sent from an external source. Think before you click links or open attachments. If suspicious, please forward to security@nisource.com for review.

Good Morning!
Attached are the slides from our prior meeting.

Let me know when it would be convenient for us to meet.

Thank you,

*Lori M. Swettlen*

*Program Manager, Residential Energy Efficiency Programs*
*800 Cabin Hill Drive*
*Greensburg, PA 15601*
*Internal: 350-5641*
*External: 724-830-5641*

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## RE: [EXTERNAL] Re: Check in and request about Gas /Electric Program Coordination

Swettlen, Lori M to: jlaverty@nisource.com 07/24/2018 03:44 PM
Cc: "spoe@nisource.com"

We will be meeting in our Greensburg offices.

The address is 800 Cabin Hill Drive, Greensburg, PA 15601

Meeting notice coming shortly.

Thank you!
Lori

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Tuesday, July 24, 2018 11:27 AM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

OK, Lori. What time works best for you and what is your address?

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "spoe@nisource.com" <spoe@nisource.com>

Date: 07/23/2018 02:29 PM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

The 22nd works the best for us.

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Friday, July 20, 2018 2:20 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Thanks!

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "spoe@nisource.com" <spoe@nisource.com>
Date: 07/20/2018 01:49 PM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Hoping to hear back by end of this week.

Thank you for your patience.

Lori

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Friday, July 20, 2018 1:28 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Lori, any response from GoodCents? Our schedules are booking up.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "spoe@nisource.com" <spoe@nisource.com>
Date: 07/16/2018 12:08 PM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Those dates work for me, let me check with GoodCents.

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Monday, July 16, 2018 12:07 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Lori,

We are out the entire week of August 13.

What about August 21 or 22?

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "spoe@nisource.com" <spoe@nisource.com>
Date: 07/16/2018 11:56 AM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

---

I'm sorry, actually that whole week is booked up.

What do you have for mid to late August?

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Monday, July 16, 2018 11:53 AM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Hi, Lori.

I'm doing well, thanks, and hope you are, too. Sarah Poe and I have Jul 31 and August 2 open if either of those work for you.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 07/12/2018 11:28 AM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

---

Hi Jack,

How are you? I was wondering if you had an idea when you would like to meet regarding the coordination of our audit programs?

Just wanted to keep it on the radar.

Thank you,

*Lori M. Swettlen*
*Program Manager, Residential Energy Efficiency Programs*
*800 Cabin Hill Drive*
*Greensburg, PA 15601*
*Internal: 350-5641*
*External: 724-830-5641*

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Tuesday, June 12, 2018 10:41 AM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

It's a great idea.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 06/12/2018 10:32 AM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Okay, that sounds good to me. I thought I would just put it out there.

**From:** jlaverty@nisource.com <jlaverty@nisource.com>
**Sent:** Tuesday, June 12, 2018 10:31 AM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Lori, I think it might initially be easiest to just have FE and COH meet together to discuss our commonalities and opportunities, and then have us all together once you have also met with Dominion.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: Elizabeth McQuaide <EMcQuaide@goodcents.com>, "spoe@nisource.com" <spoe@nisource.com>
Date: 06/08/2018 11:47 AM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Great, thank you.

Also, as a side question, do you think it makes sense to also bring Dominion in on the discussions?

***Lori M. Swettlen***
***Program Manager, Residential Energy Efficiency Programs***
***800 Cabin Hill Drive***
***Greensburg, PA 15601***
***Internal: 350-5641***
***External: 724-830-5641***

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Friday, June 8, 2018 11:42 AM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** Elizabeth McQuaide <EMcQuaide@goodcents.com>; spoe@nisource.com

**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Hi, Lori. We'll check out calendars and get back with you soon. Have a great weekend!

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "spoe@nisource.com" <spoe@nisource.com>, Elizabeth McQuaide <EMcQuaide@goodcents.com>
Date: 06/06/2018 02:11 PM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Good afternoon,

I wanted to let you know that our Residential Audit Program is fully active. We have performed quite a few audits, so I think we are at a point that we can discuss coordination.

Would you please provide me with some dates thru July that would work for you and your team?

Thank you,

***Lori M. Swettlen***
***Program Manager, Residential Energy Efficiency Programs***
***800 Cabin Hill Drive***
***Greensburg, PA 15601***

***Internal: 350-5641***
***External: 724-830-5641***

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Tuesday, April 24, 2018 12:18 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** Re: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

That's fine with us. Just let us know.
Jack Laverty, Manager
Energy Efficiency
Columbia Gas of Ohio

On Apr 24, 2018, at 12:15 PM, Swettlen, Lori M <lswettl@firstenergycorp.com> wrote:
That's good to hear. If you don't mind travelling to Akron, we can always meet there.

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Tuesday, April 24, 2018 12:13 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** Re: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

We totally understand, Lori. There are other residential and commercial EE programs about which we might want to discuss coordination opportunities, including smart thermostats, for instance, if the FE team is interested. We're happy to travel north to meet.

Thanks again.
Jack Laverty, Manager
Energy Efficiency
Columbia Gas of Ohio

On Apr 24, 2018, at 12:07 PM, Swettlen, Lori M <lswettl@firstenergycorp.com> wrote:
Good afternoon.

I am just getting back from vacation and reviewing emails.

I spoke with Franklin this morning and will be setting up a meeting the beginning to middle of May to discuss. We recently launched our Audit program and want to get that up and running before we enter into any further discussion. Thank you for your patience. We will be speaking soon.

Thank you,

***Lori M. Swettlen***
***Program Manager, Residential Energy Efficiency Programs***
***800 Cabin Hill Drive***
***Greensburg, PA 15601***
***Internal: 350-5641***
***External: 724-830-5641***

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Wednesday, April 18, 2018 1:01 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Hi, Lori. Just checking in again to see whether there are any collaboration opportunities on energy efficiency. We're doing a number of things with AEP Ohio.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "spoe@nisource.com" <spoe@nisource.com>
Date: 02/07/2018 03:08 PM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Great, thank you so much.

We will be talking soon.

Lori

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Wednesday, February 07, 2018 3:05 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Cc:** spoe@nisource.com
**Subject:** RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Sounds good, Lori. I've cc'ed Sarah Poe who manages our EE program implementation team.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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<image001.gif>

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From: "Swettlen, Lori M" <lswettl@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Date: 02/07/2018 02:51 PM
Subject: RE: [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Hi Jack,

I am Lori Swettlen and I manage the Residential Comprehensive Audits for our OH territories. Franklin is our

implementer.

What we would like to do is get our programs launched and circle back with you to discuss coordination where applicable. More than likely mid-March.

I will have Jason coordinate that meeting. Wade will also be in attendance.

Looking forward to meeting you.

Thank you,

***Lori M. Swettlen***
***Program Manager, Residential Energy Efficiency Programs***
***800 Cabin Hill Drive***
***Greensburg, PA 15601***
***Internal: 350-5641***
***External: 724-830-5641***

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Wednesday, February 07, 2018 2:01 PM
**To:** Swettlen, Lori M <lswettl@firstenergycorp.com>
**Subject:** [EXTERNAL] Re: Check in and request about Gas/Electric Program Coordination

Lori,

I had reached out to Wade after I received this email to touch base directly before any engagement with Franklin Energy/Good Cents. Do you have time to talk this week or next?
Jack Laverty, Manager
Energy Efficiency
Columbia Gas of Ohio

On Feb 7, 2018, at 9:46 AM, Swettlen, Lori M <lswettl@firstenergycorp.com> wrote:
Thank you, Jason.

Just make sure to copy me on these emails going forward. We will want to set up meetings soon to discuss.

Lori

**From:** Jason LaStella [mailto:JLaStella@goodcents.com]
**Sent:** Friday, January 26, 2018 2:28 PM
**To:** jlaverty@nisource.com
**Cc:** Elizabeth McQuaide <EMcQuaide@goodcents.com>
**Subject:** RE: Check in and request about Gas/Electric Program Coordination

Hi Jack,

Good to hear back and that you are already coordinating with them.

Our primary program contacts at FirstEnergy who would be involved are:

- Lori Swettlen, Program Manager, Residential Energy Efficiency Programs, lswettl@firstenergycorp.com

- Wade Williams, Manager Residential Implementation, williamsw@firstenergycorp.com

Please advise on best next steps to engage with your team and have a great weekend!

Sincerely,

Jason
--
Jason LaStella | Director, Business Development
Franklin Energy
Asheville, NC
415.505.2596 Phone| www.FranklinEnergy.com

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Friday, January 26, 2018 8:43 AM
**To:** Jason LaStella <JLaStella@goodcents.com>
**Cc:** Elizabeth McQuaide <EMcQuaide@goodcents.com>
**Subject:** Re: Check in and request about Gas/Electric Program Coordination

Hi Jason and Liz. Can you tell me who your contact is at First Energy? We may be coordinating several EE initiatives with them and I want to make sure I'm keeping our contacts in the loop.

Thanks.
Jack Laverty, Manager
Energy Efficiency
Columbia Gas of Ohio

On Jan 24, 2018, at 6:42 PM, Jason LaStella <JLaStella@goodcents.com> wrote:
USE CAUTION: This email was sent from an external source.
Hello Jack,

Jason LaStella from Franklin Energy touching base. Hope 2018 is off to a great start and that you recall our dialog last year. We had attempted to set up some time for an in-person discovery meeting and I hope that we revisit that and find a suitable time this year when I'm up your way again soon.

The reason for my note today is to request an audience to discuss potential for gas and electric program coordination. We are working with FirstEnergy to restart their Home Audit program in Ohio and they would like to explore opportunities for gas and electric programs to be complementary in order to better serve your shared customers.

Please meet, Liz McQuaide our program manager who will be overseeing our implementation team and leading this effort.

Liz McQuaide | Program Manager
P: 412.290.3888
Pittsburgh, PA 15203
emcquaide@GoodCents.com

Would you be open to a connecting in these regards?

Please advise and thank you for your consideration!

Jason
--

Jason LaStella | Director, Business Development
Franklin Energy
Asheville, NC
415.505.2596 Phone| www.FranklinEnergy.com

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## Fw: *EXTERNAL* COH EE programs

John A Laverty to: Melissa L Thompson, Sarah Poe 07/21/2017 01:11 PM

See Becca's note below.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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Laverty_John.vcf

----- Forwarded by John A Laverty/COH/Enterprise on 07/21/2017 01:11 PM -----

From: "Harder, Rebecca A" <rharder@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "Williams, Wade W." <williamsw@firstenergycorp.com>
Date: 07/21/2017 12:51 PM
Subject: RE: *EXTERNAL* COH EE programs

Jack. “On-hold pending approval” are programs which we are not yet launching until Commission Order/Approval.

We agree meeting in person would be beneficial. We are happy to meet at your offices. I will coordinate schedules when appropriate.
Thank you and enjoy the weekend.

**Becca Harder | Energy Efficiency | FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 | ☎: 330.384.4939 | ✉: rharder@firstenergycorp.com

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Friday, July 21, 2017 12:03 PM
**To:** Harder, Rebecca A <rharder@firstenergycorp.com>
**Cc:** Williams, Wade W. <williamsw@firstenergycorp.com>
**Subject:** RE: *EXTERNAL* COH EE programs

Becca and Wade,

For the programs on your workbook list that you sent us which show "On-hold pending approval" in the Launch Status column, does that mean they are out for bid, or that the Commission has not yet approved them?

When you are ready to meet, we'd like to get together in person, if possible, either at your offices or ours (your choice). Please let us know what works best for you.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Harder, Rebecca A" <rharder@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "Williams, Wade W." <williamsw@firstenergycorp.com>
Date: 07/13/2017 08:28 AM
Subject: RE: *EXTERNAL* COH EE programs

---

Thank you Jack. This is great. Once we've further reviewed this internally, I will be reaching out to continue the conversation.

**Becca Harder** | **Energy Efficiency** | **FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 |☎: 330.384.4939 | ✉: rharder@firstenergycorp.com

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Tuesday, July 11, 2017 5:01 PM
**To:** Harder, Rebecca A <rharder@firstenergycorp.com>
**Cc:** Williams, Wade W. <williamsw@firstenergycorp.com>
**Subject:** RE: *EXTERNAL* COH EE programs

Good question. We collaborate on a number of programs.

1. **Comprehensive Energy audits** (Home Energy Audits/Rebates, or HEAR) - our program does our natural gas energy audits and allows our program implementer's energy auditors to install electric measures (cfls/LEDs, etc.) during the energy audit process. We target higher use homes, which are generally pre 1980 vintage on the gas side.
2. We cost share a **student education program**, e3smart, run by Ohio Energy project that has been certified by the Ohio Department of Education. We offer it jointly in 45 counties that we both serve, as well as in a stand alone mode in counties where we don't overlap. It's a good model that AEP started years ago.
3. We jointly run a **new homes program**, EfficiencyCrafted Homes, that provides rebates to builders who build homes about 30% better than Ohio energy code, including Energy Star certified homes.
4. We are collaborating on **smart thermostat rebates**, including making customers aware of both our rebates, as well as some in progress work with IGS. (Joe Olicker tells me that he has talked with someone at your company). We expect to expand this initiative.
5. Our community based providers jointly deliver both AEP's and COH's (and other) l**ow-income EE programs.** Our WarmChoice program has been around since 1987.
6. For our **commercial EE programs**, including Innovative Energy Solutions, independent energy auditors leverage both our and AEP's rebates for energy audits and EE upgrades for non-residential programs. We also have the same implementer which improves coordination.
7. We coordinate with AEP on its **Community Energy Savers** program to bring all of our programs to a sponsoring community. Goals are set for above baseline participation rates, that, if achieved, result in a financial award that can be used for EE upgrades to a building or project of their choice.
8. We are collaborating on a software platform to automate energy usage data transfers for **building benchmarking** via **EPA's portfolio manager.**

That's what comes to mind off the top of my head. We've been working together since about 2010, I think. It's been a good partnership that benefits our jointly served customers. Jon Williams and his team are great partners.

Please let me know if you have any questions.

Thanks.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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From: "Harder, Rebecca A" <rharder@firstenergycorp.com>
To: "jlaverty@nisource.com" <jlaverty@nisource.com>,
Cc: "Williams, Wade W." <williamsw@firstenergycorp.com>
Date: 07/11/2017 04:19 PM
Subject: RE: *EXTERNAL* COH EE programs

USE CAUTION: This email was sent from an external source.

Thank you Jack. Just a few follow-up question on this…
Of these programs, are there any in which you are (or plan to) collaborating with AEP?

**Becca Harder** | **Energy Efficiency** | **FirstEnergy**
76 South Main St. | Akron, OH 44308 | A-GO-8 | ☎: 330.384.4939 | ✉: rharder@firstenergycorp.com

**From:** jlaverty@nisource.com [mailto:jlaverty@nisource.com]
**Sent:** Tuesday, July 11, 2017 11:29 AM
**To:** Harder, Rebecca A <rharder@firstenergycorp.com>
**Cc:** Williams, Wade W. <williamsw@firstenergycorp.com>
**Subject:** *EXTERNAL* COH EE programs

Hi, Becca and Wade.

In advance of future discussions with FE about EE program collaboration opportunities, attached is a list of our natural gas EE programs for our 2017-2022 plan.

Please let me know if you have questions.

**Jack Laverty | Manager, Energy Efficiency**
Columbia Gas of Ohio, Inc. | 290 W. Nationwide Blvd. | Columbus, OH 43215
jlaverty@nisource.com | 614.460.4714 (O) | 614.477.0420 (C)

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**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-4. After the PUCO issued its Opinion and Order dated 12/21/2016 in Docket No. 16-1309, when did Columbia Gas first discuss meeting with AEP to discuss a joint rebate program?

a. When did that first meeting take place?
b. What was the reasoning behind that decision in terms of the timing of the meeting?
c. Please provide whatever description you can of AEP's response regarding a joint rebate program, including the times and dates of the conversations and emails.

**RESPONSE:**

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1 and ELPC Interrogatory Set 1, No. 2.

For email correspondence with AEP Ohio regarding the consolidated smart thermostat rebate process please see ELPC Interrogatory Set 1, No. 4, Attachment A and ELPC Interrogatory Set 1, No. 4, Attachment B.

# RE: [EXTERNAL] Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate) - Follow up Email

David W Tabata to: mlthompson@nisource.com 06/25/2019 02:54 PM

History: This message has been replied to.

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AEP Ohio is good with the survey

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Thursday, June 20, 2019 8:38 PM
**To:** Tamara.Turkenton@puco.ohio.gov; Zee.Molter@puco.ohio.gov; Dorothy.Bremer@puco.ohio.gov; Barbara.Bossart@puco.ohio.gov; suzanne.williams@puco.ohio.gov; james.ripke@puco.ohio.gov; lswettl@firstenergycorp.com; David W Tabata <dwtabata@aep.com>; Deanna M Gilliland <dmgilliland@aep.com>; amilam@ofbf.org; bojko@carpenterlipps.com; cendsley@ofbf.org; christopher.healey@occ.ohio.gov; cmooney@ohiopartners.org; dborchers@bricker.com; glpetrucci@vorys.com; ibatikov@vorys.com; john.jones@ohioattorneygeneral.gov; joliker@igsnergy.com; lcurtis@ofbf.org; lesliekovacik@toledo.oh.gov; mfleisher@elpc.org; emille3@firstenergycorp.com; nwilliams@firstenergycorp.com; Settineri, Michael J. <mjsettineri@vorys.com>; Amy Milam <amilam@ofbf.org>; Chad Endsley <cendsley@ofbf.org>; Dale Arnold <darnold@ofbf.org>; Leah Curtis <lcurtis@ofbf.org>; dparram@bricker.com; Dave Rinebolt <drinebolt@opae.org>; alla.tempesta@puco.ohio.gov; craig.smith@puco.ohio.gov
**Cc:** sseiple@nisource.com; JosephClark@nisource.com; jlaverty@nisource.com; spoe@nisource.com; ametz@nisource.com; CRausch@nisource.com
**Subject:** [EXTERNAL] Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate) - Follow up Email

This is an **EXTERNAL** email. **STOP**. **THINK** before you CLICK links or OPEN attachments. If suspicio
device.

Good evening,
Thank you to everyone who attended yesterday's kick-off meeting. We know you all have very busy schedules, and truly appreciate you all setting aside time to talk through the Commission's directives.

To follow up our meeting, we are asking for you edits or changes to our draft survey, which is attached, by next Friday, June 28.

Thereafter, we will distribute the final survey electronically for your review the first week of July. We are asking for your responses to this survey by July 19.

Our next meeting will be on Wednesday, July 31 at 10:00 am in Hearing Room 11-C at the PUCO's Offices (180 East Broad Street, Columbus, Ohio). We will be reviewing the survey responses.

For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

Thank you all for your participation, and have a wonderful weekend!

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

----- Forwarded by Melissa L Thompson/NCS/Enterprise on 06/20/2019 08:18 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, bojko@carpenterlipps.com, cendsley@ofbf.org, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org, emille3@firstenergycorp.com, nwilliams@firstenergycorp.com, "Settineri, Michael J." <mjsettineri@vorys.com>, Amy Milam <amilam@ofbf.org>, Chad Endsley <cendsley@ofbf.org>, Dale Arnold <darnold@ofbf.org>, Leah Curtis <lcurtis@ofbf.org>,
Cc: sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE
Date: 06/18/2019 12:57 PM
Subject: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate)

---

Good afternoon,
On behalf of Columbia Gas of Ohio, attached is our agenda for the meeting tomorrow morning at 10:00 am in Hearing Room 11-B at the PUCO's Offices (180 East Broad Street, Columbus, Ohio).

We will have a dial-in for the meeting. Please use:

1-855-481-1480
Passcode: 276250

For the meeting, we will be discussing a survey for all participants to take to after the meeting to understand how all EDUs, CRES, and CRNG suppliers. The survey is attached for your review.

Thank you all for your participation tomorrow.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
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Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

----- Forwarded by Melissa L Thompson/NCS/Enterprise on 06/11/2019 02:31 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, lswettl@firstenergycorp.com, DWTABATA@AEP.COM, dmgilliland@aep.com, amilam@ofbf.org, Andrew Metz/COH/Enterprise@NISOURCE, bojko@carpenterlipps.com, callwein@keglerbrown.com, cendsley@ofbf.org, Cheryl MacDonald/NCS/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, dborchers@bricker.com, glpetrucci@vorys.com, ibatikov@vorys.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, mfleisher@elpc.org,
Cc: sseiple@nisource.com, JosephClark@nisource.com, jlaverty@nisource.com, spoe@nisource.com, Christine Rausch/COH/Enterprise@NISOURCE
Date: 05/31/2019 10:17 PM
Subject: Fw: Save the Date: Wednesday, June 19, 2019 Kick Off Meeting (Consolidated Smart Thermostat Rebate)

---

Good evening,
On behalf of Columbia Gas of Ohio, you are cordially invited to a meeting on Wednesday, June 19 at 10:00 am in Hearing Room 11-B at the PUCO's Offices (180 East Broad Street, Columbus, Ohio).

At this meeting, we will discuss the potential implementation of a consolidated smart thermostat rebate process for customers in Columbia Gas of Ohio's service area. Columbia will be distributing an agenda closer to this introductory meeting to guide our conversation regarding the potential partnership with electric distribution utilities, CRES and CRNG suppliers that operate within Columbia Gas of Ohio's service area.

We anticipate this kick off meeting will the first in a series of meetings to discuss the intricacies of developing a consolidated smart thermostat rebate process with Columbia's customers that may have overlapping eligibility with some of the EDU, CRES, and CRNG suppliers' programs.

Thank you in advance for attending this meeting, sorry for the confusion regarding the date, and we look forward to seeing you then.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440

mlthompson@nisource.com

**Re: [EXTERNAL] Consolidated Smart Thermostat Rebate Process Meeting - Wednesday, September 18**

Deanna M Gilliland to: mlthompson@nisource.com 09/18/2019 10:31 AM

USE CAUTION: This email was sent from an external source. Think before you click links or open attachments. If suspicious, please forward to security@nisource.com for review.

Hello Melissa.
Just confirming that I was on the call today.

Best Regards,
Deanna Gilliland
AEP Ohio Efficient Products Program Manager

On Sep 16, 2019, at 4:07 PM, "mlthompson@nisource.com" <mlthompson@nisource.com> wrote:

This is an **EXTERNAL** email. **STOP**. **THINK** before you CLICK links or OPEN attachments. If suspicio
device.

Good afternoon,
We are looking forward to seeing everyone this Wednesday, September 18, at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers. The presentation showing this high-level structure is attached below.

Thank you all for your continued participation, and we will see you soon.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440

mlthompson@nisource.com

From: Melissa L Thompson/NCS/Enterprise
To: alla.tempesta@puco.ohio.gov, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,
Date: 08/05/2019 09:08 PM
Subject: Consolidated Smart Thermostat Rebate Process - Next Meeting, September 18

---

Good evening,
Thank you to everyone who attended, in person or by phone, last week's Consolidated Smart Thermostat Rebate Process Meeting. Attached, is an electronic copy of the sign-in sheet from that meeting.

We have scheduled our next meeting for Wednesday, September 18 at 10:00 am in Hearing Room 11-C at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will be reviewing a proposed, high-level structure for an online consolidated smart thermostat rebate process for Columbia Gas of Ohio customers.

Thank you all for your participation, and we look forward to seeing you soon!

Best regards,
Melissa

[attachment "Sign-in Sheet.pdf" deleted by Melissa L Thompson/NCS/Enterprise]

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

<Consolidated Smart Thermostat Rebate Presentation.pdf>

**RE: [EXTERNAL] Consolidated Smart Thermostat Rebate Process Meeting - Tuesday, December 10**

Deanna M Gilliland to: mlthompson@nisource.com 12/10/2019 10:28 AM

USE CAUTION: This email was sent from an external source. Think before you click links or open attachments. If suspicious, please forward to security@nisource.com for review.

Hi Melissa.

Just following up to let you know that I was on the call.

Best Regards,
Deanna

**DEANNA M GILLILAND** | **EE&CONSUMER PROGRAM COORD PRIN**
DMGILLILAND@AEP.COM | D:740.384.7996
3 W. THIRTEENTH ST., WELLSTON, OH 45692

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Monday, December 9, 2019 5:45 PM
**To:** Alla.Magaziner-Tempesta@puco.ohio.gov; ametz@nisource.com; amilam@ofbf.org; Barbara.Bossart@puco.ohio.gov; bojko@carpenterlipps.com; cendsley@ofbf.org; CRausch@nisource.com; christopher.healey@occ.ohio.gov; cmooney@ohiopartners.org; Colleen.Shutrump@occ.ohio.gov; craig.smith@puco.ohio.gov; Dale Arnold <darnold@ofbf.org>; dborchers@bricker.com; Deanna M Gilliland <dmgilliland@aep.com>; Dorothy.Bremer@puco.ohio.gov; dparram@bricker.com; Dave Rinebolt <drinebolt@opae.org>; David W Tabata <dwtabata@aep.com>; emille3@firstenergycorp.com; glpetrucci@vorys.com; ibatikov@vorys.com; james.ripke@puco.ohio.gov; jlaverty@nisource.com; john.jones@ohioattorneygeneral.gov; joliker@igsnergy.com; JosephClark@nisource.com; Spottswood, Jhay <JSpottswood@bricker.com>; lcurtis@ofbf.org; lesliekovacik@toledo.oh.gov; lswettl@firstenergycorp.com; mfleisher@elpc.org; Settineri, Michael J. <mjsettineri@vorys.com>; nwilliams@firstenergycorp.com; spoe@nisource.com; sseiple@nisource.com; suzanne.williams@puco.ohio.gov; Tamara.Turkenton@puco.ohio.gov; Zee.Molter@puco.ohio.gov
**Subject:** [EXTERNAL] Consolidated Smart Thermostat Rebate Process Meeting - Tuesday, December 10

This is an **EXTERNAL** email. **STOP**. **THINK** before you CLICK links or OPEN attachments. If suspicio
device.

Good afternoon,
We are looking forward to seeing you tomorrow morning at the consolidated smart thermostat rebate processing meeting.

Our meeting will be at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we anticipate receiving your feedback on structure presented by Columbia, as well as providing the parties a high-level cost for pursuing the proposed structure.

Thanks everyone for your continued participation, and we look forward to seeing you soon.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>, "Spottswood, Jhay" <JSpottswood@bricker.com>,
Date: 10/24/2019 05:21 PM
Subject: Next Consolidated Smart Thermostat Rebate Process Meeting - Tuesday, December 10

Good afternoon,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting yesterday. For your convenience, I've attached the sign-in sheet from that meeting.

Our next meeting will be on Tuesday, December 10 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we anticipate receiving your feedback on structure presented by Columbia, as well as reviewing with everyone a more detailed consolidated smart thermostat rebate process.

Thanks everyone for your continued participation, and we look forward to seeing you in December.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

**Re: [EXTERNAL] Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)**

Deanna M Gilliland to: mlthompson@nisource.com 01/13/2020 11:23 AM
Cc: David W Tabata

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AEP Ohio is not interested in a consolidated thermostat rebate process at this time.

Best Regards,
Deanna

On Jan 13, 2020, at 11:03 AM, "mlthompson@nisource.com" <mlthompson@nisource.com> wrote:

This is an **EXTERNAL** email. **STOP**. **THINK** before you CLICK links or OPEN attachments. If suspicio
device.

Good morning,
I wanted to send a follow-up note requesting your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020**.

Thanks everyone for your participation in this process.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, "Spottswood, Jhay"

<JSpottswood@bricker.com>, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,

Date: 12/10/2019 08:41 PM

Subject: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

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Good evening,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting today. For your convenience, I've attached the sign-in sheet from today's meeting.

Our next meeting will be on Tuesday, March 3, 2020 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will review the responses from the electric, CRES, and CRNG suppliers as to each company's interest in the consolidated smart thermostat rebate process. We will also review any next steps.

Importantly, Columbia is requesting your response of your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020.**

Thanks everyone for your continued participation, have a safe and wonderful holiday, and we will see you in the new year!

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

<Sign-in Sheet 12.10.2019.pdf>

**RE: [EXTERNAL] Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)**

Deanna M Gilliland to: mlthompson@nisource.com 02/11/2020 04:32 PM

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No

**From:** mlthompson@nisource.com <mlthompson@nisource.com>
**Sent:** Tuesday, February 11, 2020 4:26 PM
**To:** Alla.Magaziner-Tempesta@puco.ohio.gov; ametz@nisource.com; amilam@ofbf.org; Barbara.Bossart@puco.ohio.gov; bojko@carpenterlipps.com; cendsley@ofbf.org; CRausch@nisource.com; christopher.healey@occ.ohio.gov; cmooney@ohiopartners.org; Colleen.Shutrump@occ.ohio.gov; craig.smith@puco.ohio.gov; Dale Arnold <darnold@ofbf.org>; dborchers@bricker.com; Deanna M Gilliland <dmgilliland@aep.com>; Dorothy.Bremer@puco.ohio.gov; dparram@bricker.com; Dave Rinebolt <drinebolt@opae.org>; David W Tabata <dwtabata@aep.com>; emille3@firstenergycorp.com; glpetrucci@vorys.com; ibatikov@vorys.com; james.ripke@puco.ohio.gov; jlaverty@nisource.com; john.jones@ohioattorneygeneral.gov; joliker@igsnergy.com; JosephClark@nisource.com; Spottswood, Jhay <JSpottswood@bricker.com>; lcurtis@ofbf.org; lesliekovacik@toledo.oh.gov; lswettl@firstenergycorp.com; mfleisher@elpc.org; Settineri, Michael J. <mjsettineri@vorys.com>; nwilliams@firstenergycorp.com; spoe@nisource.com; sseiple@nisource.com; suzanne.williams@puco.ohio.gov; Tamara.Turkenton@puco.ohio.gov; Zee.Molter@puco.ohio.gov
**Subject:** [EXTERNAL] Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

This is an **EXTERNAL** email. **STOP**. **THINK** before you CLICK links or OPEN attachments. If suspicio
device.

Good afternoon,
I wanted to send a follow-up note requesting your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020**.

Thanks everyone for your participation in this process.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
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Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
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mlthompson@nisource.com

----- Forwarded by Melissa L Thompson/NCS/Enterprise on 02/11/2020 04:22 PM -----

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, "Spottswood, Jhay" <JSpottswood@bricker.com>, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,

Date: 01/13/2020 11:02 AM

Subject: Re: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

---

Good morning,
I wanted to send a follow-up note requesting your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020**.

Thanks everyone for your participation in this process.

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

From: Melissa L Thompson/NCS/Enterprise
To: "Alla.Magaziner-Tempesta@puco.ohio.gov" <Alla.Magaziner-Tempesta@puco.ohio.gov>, ametz@nisource.com, amilam@ofbf.org, "Barbara.Bossart@puco.ohio.gov" <Barbara.Bossart@puco.ohio.gov>, bojko@carpenterlipps.com, cendsley@ofbf.org, Christine Rausch/COH/Enterprise@NISOURCE, christopher.healey@occ.ohio.gov, cmooney@ohiopartners.org, Colleen.Shutrump@occ.ohio.gov, craig.smith@puco.ohio.gov, Dale Arnold <darnold@ofbf.org>, dborchers@bricker.com, dmgilliland@aep.com, "Dorothy.Bremer@puco.ohio.gov" <Dorothy.Bremer@puco.ohio.gov>, dparram@bricker.com, Dave Rinebolt <drinebolt@opae.org>, DWTABATA@AEP.COM, emille3@firstenergycorp.com, glpetrucci@vorys.com, ibatikov@vorys.com, "james.ripke@puco.ohio.gov" <james.ripke@puco.ohio.gov>, jlaverty@nisource.com, john.jones@ohioattorneygeneral.gov, joliker@igsnergy.com, JosephClark@nisource.com, "Spottswood, Jhay" <JSpottswood@bricker.com>, lcurtis@ofbf.org, lesliekovacik@toledo.oh.gov, lswettl@firstenergycorp.com, mfleisher@elpc.org, "Settineri, Michael J." <mjsettineri@vorys.com>, nwilliams@firstenergycorp.com, spoe@nisource.com, sseiple@nisource.com, "suzanne.williams@puco.ohio.gov" <suzanne.williams@puco.ohio.gov>, "Tamara.Turkenton@puco.ohio.gov" <Tamara.Turkenton@puco.ohio.gov>, "Zee.Molter@puco.ohio.gov" <Zee.Molter@puco.ohio.gov>,

Date: 12/10/2019 08:41 PM

Subject: Next Meeting - Tuesday, March 3, 2020 (Response Requested by Feb. 21, 2020)

---

Good evening,
Thank you to everyone who attended our Consolidated Smart Thermostat Rebate Process Meeting today. For your convenience, I've attached the sign-in sheet from today's meeting.

Our next meeting will be on Tuesday, March 3, 2020 at 10:00 am in Conference Room 380 at the PUCO's Offices. For those unable to attend in person, we will be using the following dial-in for the meeting:

1-855-481-1480
Passcode: 276250

At this meeting, we will review the responses from the electric, CRES, and CRNG suppliers as to each company's interest in the consolidated smart thermostat rebate process. We will also review any next steps.

Importantly, Columbia is requesting your response of your company's interest in the consolidated smart thermostat rebate process (either yes or no) by **Friday, February 21, 2020.**

Thanks everyone for your continued participation, have a safe and wonderful holiday, and we will see you in the new year!

Best regards,
Melissa

Melissa L. Thompson
Director of Regulatory Policy
Columbia Gas of Ohio, Inc.
290 W. Nationwide Blvd.
Columbus, Ohio 43215
Office: (614) 460-5542
Mobile: (614) 315-3391
Facsimile: (614) 460-8440
mlthompson@nisource.com

**RE: [EXTERNAL] Link to AEP Ohio Rebates**
David W Tabata to: spoe@nisource.com 06/10/2019 10:08 AM
Cc: "CRausch@nisource.com"

USE CAUTION: This email was sent from an external source. Think before you click links or open attachments. If suspicious, please forward to security@nisource.com for review.

Perfect. Thank you

**From:** spoe@nisource.com <spoe@nisource.com>
**Sent:** Friday, June 7, 2019 3:50 PM
**To:** David W Tabata <dwtabata@aep.com>
**Cc:** CRausch@nisource.com
**Subject:** [EXTERNAL] Link to AEP Ohio Rebates

This is an **EXTERNAL** email. **STOP**. **THINK** before you CLICK links or OPEN attachments. If suspicious please click the '**Report to Incidents**' button in Outlook or forward to incidents@aep.com from a mobile device.

---

Hi Dave -

Happy Friday!

I wanted to introduce you to Christine Rausch from our team - she's been helping a lot with CES and ACCC behind the scenes generating interest in our showerheads and pre-rinse spray valves! Chris also manages a variety of our EE programs, including our product rebates program. I know that AEP included a link to Columbia's EE programs on its website, and Chris has been working to get a link to AEP's EE programs on our site. We wanted to share it with you to take a look and make sure you were good with it: https://www.columbiagasohio.com/energy-efficiency/for-your-home/product-rebates.

Thanks so much, and have a great weekend!
Sarah

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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## RE: [EXTERNAL] 2018 AEP Smart Thermostat Rebates

Deanna M Gilliland to: spoe@nisource.com 06/21/2018 10:28 AM

1 would be perfect. Thanks!

**From:** spoe@nisource.com <spoe@nisource.com>
**Sent:** Thursday, June 21, 2018 10:27 AM
**To:** Deanna M Gilliland <dmgilliland@aep.com>
**Subject:** RE: [EXTERNAL] 2018 AEP Smart Thermostat Rebates

I am available at 1 or 4 on Monday if either time works for you?

Thanks,

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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From: Deanna M Gilliland <dmgilliland@aep.com>
To: "spoe@nisource.com" <spoe@nisource.com>,
Date: 06/21/2018 09:35 AM
Subject: RE: [EXTERNAL] 2018 AEP Smart Thermostat Rebates

Hi Sarah.

What is your availability Monday afternoon?

Best Regards,
Deanna

**From:** spoe@nisource.com <spoe@nisource.com>
**Sent:** Wednesday, June 20, 2018 2:10 PM
**To:** Deanna M Gilliland <dmgilliland@aep.com>
**Subject:** Fw: [EXTERNAL] 2018 AEP Smart Thermostat Rebates

Hi Deanna -

I wanted to follow-up to see if you had any availability to touch base on smart thermostat rebates and if there's an opportunity to partner similar to notify customers of each other's rebates?

Thanks so much,
Sarah

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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----- Forwarded by Sarah Poe/COH/Enterprise on 06/19/2018 04:42 PM -----

From: Sarah Poe/COH/Enterprise
To: Deanna M Gilliland <dmgilliland@aep.com>,
Date: 06/06/2018 05:12 PM
Subject: Re: [EXTERNAL] 2018 AEP Smart Thermostat Rebates

Hi Deanna-

Hope you're 2018 is going well! I wanted to reach out to see if you had some time to touch base to see if there are partnership opportunities on our smart thermostat rebates? We're launching a new site for our product rebates and I'm really interested in if we can stack rebates or refer customers to AEP Ohio's rebates while customers are making a purchase so that customers can receive both rebates. Let me know if you have any time in the next couple of weeks to touch base - if you're in Columbus I'm happy to meet for coffee or just jump on a quick call. Let me know what works best for you.

Thanks,
Sarah

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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From: Deanna M Gilliland <dmgilliland@aep.com>
To: "spoe@nisource.com" <spoe@nisource.com>,
Date: 01/16/2018 07:19 PM
Subject: Re: [EXTERNAL] 2018 AEP Smart Thermostat Rebates

---

USE CAUTION: This email was sent from an external source.

Hello! We had a great holiday. Hope you did as well.

Yes, that is correct. In 2018, we are offering $25 for gas heat, $100 for electric heat.

Also, I'm not sure if you noticed, but we added a "banner ad" referring customers to COH to check out your programs and rebates. Here is a snapshot:

Best Regards,
Deanna

On Jan 16, 2018, at 5:47 PM, "spoe@nisource.com" <spoe@nisource.com> wrote:

This is an EXTERNAL email. STOP. THINK before you CLICK links or OPEN attachments. If

suspicious please forward to incidents@aep.com for review.

---

Hi Deanna -

Hope that you had a nice Holiday and New Year! I wanted to confirm with you the level of rebate that AEP will be providing for smart thermostats during 2018. I just went to AEPOhio.com, and it looks like you're offering $25 for gas heated homes. Is this correct?

Thanks,
Sarah

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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**Re: [EXTERNAL] AEP Smart Thermostats**
Deanna M Gilliland to: spoe@nisource.com 09/20/2017 12:03 PM

History: This message has been replied to.

Hi Sarah.
We do request 2017 purchases apply for the rebate by 12/15/17, but we are planning to have smart thermostat rebates in our 2018 program as well.
Regards,
Deanna

On Sep 20, 2017, at 7:34 AM, "spoe@nisource.com" <spoe@nisource.com> wrote:

> Hi Deanna -
>
> I received a question from a customer asking if there is an expiration date for the rebate offer? I know that we don't have an expiration date, but I wasn't sure about AEP. Do you have an expiration date for the $75 rebate? I'm also happy to refer the customer to you, or someone on your team if you'd like to answer AEP specific questions.
>
> Thanks,
>
> Sarah Poe | Manager of Energy Efficiency Programs
> Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
> Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com
>
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From: Deanna M Gilliland <dmgilliland@aep.com>
To: "spoe@nisource.com" <spoe@nisource.com>,
Date: 09/12/2017 03:04 PM
Subject: RE: [EXTERNAL] AEP Smart Thermostats

Looks good! Thanks for sharing!

**From:** spoe@nisource.com [mailto:spoe@nisource.com]
**Sent:** Tuesday, September 12, 2017 2:43 PM
**To:** Deanna M Gilliland <dmgilliland@aep.com>
**Cc:** HBalla@nisource.com
**Subject:** RE: [EXTERNAL] AEP Smart Thermostats

Hi Deanna - Below is an image of the Nest portion of the email that we're planning to send to customers in an AEP zip code on Thursday.

<mime-attachment.gif>

And at the bottom we have the message that program requirements/limitations apply:
<mime-attachment.gif>

Please let me know if you have any feedback or concerns by mid-afternoon tomorrow, if possible, so that I can share them with our team who executes emails. Thanks so much for your partnership on this - I'm excited that we can partner our rebates on this product to get such a great price for customers!

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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From: Deanna M Gilliland <dmgilliland@aep.com>
To: "spoe@nisource.com" <spoe@nisource.com>,
Cc: "HBalla@nisource.com" <HBalla@nisource.com>
Date: 09/11/2017 12:48 PM
Subject: RE: [EXTERNAL] AEP Smart Thermostats

Sarah,

I've made a few edits:

**Special Offer – New Nest Thermostat E for $19***

The Nest Thermostat E turns itself down when you're away. You can control it from anywhere. Its frosted display is beautifully designed to blend into any decor. And the best part? **It can be yours for just $19** after rebates from Columbia Gas of Ohio and AEP Ohio, saving just got a lot easier.

Purchase Today >
Once your purchase is made, redeem AEP Ohio's rebate separately at
www.AEPOhio.com/Rebates

I would also ask that a footnote to the effect "Program requirements and limitations apply." or something to that effect and that the $19 is after rebates. Once the email is mocked up or coded, can you please share the final creative?

Thanks again!
Deanna

**From:** spoe@nisource.com [mailto:spoe@nisource.com]
**Sent:** Friday, September 08, 2017 4:06 PM
**To:** Deanna M Gilliland <dmgilliland@aep.com>
**Cc:** HBalla@nisource.com
**Subject:** RE: [EXTERNAL] AEP Smart Thermostats

Of course!

Here's the current portion of the email that references AEP's rebate. It will be sent to our customers who live in a zip code that is also served by AEP.

**Special Offer – New Nest Thermostat E for $19**

The Nest Thermostat E turns itself down when you're away. You can control it from anywhere. And its frosted display is beautifully designed to blend right now. The best part? **It can be yours for just $19**. With rebates from Columbia Gas of Ohio and AEP Ohio, saving just got a lot easier.

Purchase Today >

Once your purchase is made, redeem AEP's rebate separately here:
https://www.aepohio.com/save/residential/programs/ApplianceRebateProgram.aspx

The "Purchase Today" will link the Nest E page on our e-store.

Do you think you'd be able to share any feedback that you have with us on Monday? We're planning to send the email on Tuesday. Sorry for the short notice! Please let us know if you have any questions or concerns.

Thanks,

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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From: Deanna M Gilliland <dmgilliland@aep.com>
To: "spoe@nisource.com" <spoe@nisource.com>,
Cc: "HBalla@nisource.com" <HBalla@nisource.com>
Date: 09/08/2017 03:37 PM
Subject: RE: [EXTERNAL] AEP Smart Thermostats

---

USE CAUTION: This email was sent from an external source.

Hi Sarah.

Yes, customers who are dual fuel are eligible for a $75 rebate, and the Nest E is a qualified product. Could I please get a chance to review the email? I don't anticipate any concerns, but would like to run it by corp communications (my efforts to keep everyone happy ;) )

Thanks,
Deanna

**From:** spoe@nisource.com [mailto:spoe@nisource.com]
**Sent:** Friday, September 08, 2017 3:29 PM
**To:** Deanna M Gilliland <dmgilliland@aep.com>
**Cc:** HBalla@nisource.com
**Subject:** [EXTERNAL] AEP Smart Thermostats

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review.

---

Hi Deanna -

Hope you're doing well! We are working on an upcoming email on the new Nest E to send to our customers, and we'd like to include a note that customers who are also AEP Ohio customers can apply both utilities' rebates to get the product for just $19! I wanted to confirm with you that AEP is offering its $75 smart thermostat rebate on this new product, and that you're comfortable with us including this in our email.

If you could give me a call or shoot me an email on this, I'd really appreciate it. I want to make sure we have the correct information as we're working on finalizing the content. My cell is 614-315-6545 and you can call or text anytime.

Thanks,

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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## Special offer - new Nest Thermostat E for $19*

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**Purchase today >**

Once your purchase is made, redeem AEP Ohio's rebate separately at **www.AEPOhio.com/Rebates**.

**Program requirements and limitations apply. The $19 price is after the Columbia Gas and AEP rebates are applied.*

**RE: [EXTERNAL] Re: 2018 smart thermostat rebate question**
David W Tabata to: spoe@nisource.com 11/16/2017 01:45 PM
Cc: Jon F Williams

Thank you Sarah

**DAVID W TABATA** | **EE & CONSUMER PROGRAMS MGR**
DWTABATA@AEP.COM | D:614.883.7887
700 MORRISON ROAD, GAHANNA, OH 43230

**From:** spoe@nisource.com [mailto:spoe@nisource.com]
**Sent:** Thursday, November 16, 2017 1:44 PM
**To:** David W Tabata
**Subject:** [EXTERNAL] Re: 2018 smart thermostat rebate question

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Hi Dave -

Our Stipulation includes a $75 rebate level on learning thermostats through our Simple Energy Solutions program. I'll check with Jack on this to get his thoughts as well.

Thanks,

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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From: David W Tabata <dwtabata@aep.com>
To: "spoe@nisource.com" <spoe@nisource.com>,
Date: 11/16/2017 12:07 PM
Subject: 2018 smart thermostat rebate question

USE CAUTION: This email was sent from an external source.

Hi Sarah-

As we begin to implement rebates for 2018 for smart thermostats, Deanna mentioned Columbia was still considering $75 rebates even on the much reduced costs of the NEST and Ecobee. Is Columbia mandated to provided that level of rebate since we could get to a point with both rebates combined (AEP OHIO and Columbia Gas of Ohio) could be greater than the costs of the thermostat.

We from a cost effectiveness are trying to see if we can reduce the amount of the rebate that combined we would be offsetting 50% of the costs and not much greater than that. Thoughts.

Thanks

Dave

**DAVID W TABATA** | **EE & CONSUMER PROGRAMS MGR**
DWTABATA@AEP.COM | D:614.883.7887
700 MORRISON ROAD, GAHANNA, OH 43230

## RE: [EXTERNAL] Upcoming Smart Thermostat Promotions

Deanna M Gilliland to: spoe@nisource.com 10/26/2017 12:25 PM

History: This message has been replied to.

USE CAUTION: This email was sent from an external source.

Sorry for not getting back to you sooner… I think Vince with Nest has something set up for tomorrow for us all to get together by phone for a quick call.

Hope all is well with you!
Deanna

**From:** spoe@nisource.com [mailto:spoe@nisource.com]
**Sent:** Wednesday, October 18, 2017 7:43 AM
**To:** Deanna M Gilliland <dmgilliland@aep.com>
**Subject:** [EXTERNAL] Upcoming Smart Thermostat Promotions

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---

Hi Deanna -

I wanted to reach out to see if you'd be interested in partnering on some upcoming smart thermostat promotions with Nest to allow joint customers to receive a combined rebate instantly. Let me know if you'd have some time to chat and I can engage our Nest contact and Hanna Balla, our marketing manager, in a discussion.

Thanks!
Sarah

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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**FW: PUCO Directive to Columbia Gas re working with AEP on smart thermostat rebate program**

David W Tabata to: spoe@nisource.com, jlaverty@nisource.com, Deanna M Gilliland, Julie Volpe-Walker 04/17/2019 08:58 AM

Cc: Brian F Billing

History: This message has been forwarded.

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Looks like we need to have a meeting to figure this out. How does folks schedules look within the next two weeks?

Thanks

Dave

**From:** Brian F Billing <bfbilling@aep.com>
**Sent:** Tuesday, April 16, 2019 5:26 PM
**To:** David W Tabata <dwtabata@aep.com>
**Subject:** Fwd: PUCO Directive to Columbia Gas re working with AEP on smart thermostat rebate program

FYI
Sent from my iPhone

Begin forwarded message:

**From:** Steven T Nourse <stnourse@aep.com>
**Date:** April 16, 2019 at 5:22:08 PM EDT
**To:** Jon F Williams <jfwilliams@aep.com>, Brian F Billing <bfbilling@aep.com>
**Cc:** Marc D Reitter <mdreitter@aep.com>, Andrea E Moore <aemoore@aep.com>, Dona Seger-Lawson <dseger-lawson@aep.com>
**Subject: PUCO Directive to Columbia Gas re working with AEP on smart thermostat rebate program**

Last week, the Commission issued an order in the Columbia Gas DSM/EE plan case. In paragraph 24, the Commission directed Columbia to work with AEP Ohio and the FirstEnergy Corporation electric distribution utilities to implement a single consolidated rebate application process for a smart thermostat program. Here is the link to the order: http://dis.puc.state.oh.us/DocumentRecord.aspx?DocID=15cbed69-8c7f-4743-b132-2378a5e34bf7

Please let me know if you want to discuss and advise re: your plan for following up on this directive.

**STEVEN T NOURSE** | **VP-LEGAL**
STNOURSE@AEP.COM | D:614.716.1608
1 RIVERSIDE PLAZA, COLUMBUS, OH 43215

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**RE: [EXTERNAL] Consolidated Smart Thermostat Rebate Process**
David W Tabata to: spoe@nisource.com 08/20/2019 08:46 AM

I can come to your team

**From:** spoe@nisource.com <spoe@nisource.com>
**Sent:** Tuesday, August 20, 2019 7:52 AM
**To:** David W Tabata <dwtabata@aep.com>
**Subject:** Re: [EXTERNAL] Consolidated Smart Thermostat Rebate Process

Sounds great. Thanks! Let us know if you'd like for us to come out to your office and if there is anyone else from your team that should be included and I'll send out an invite.

Thanks,

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

At Columbia Gas of Ohio, we believe saving matters.
That's why we provide energy efficiency offerings that make sure you have a little extra in your wallet.
Learn more: ColumbiaGasOhio.com/SavingMatters.

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From: David W Tabata <dwtabata@aep.com>
To: "spoe@nisource.com" <spoe@nisource.com>,
Date: 08/19/2019 07:44 PM
Subject: Re: [EXTERNAL] Consolidated Smart Thermostat Rebate Process

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Hi Sarah. Aug 27 around 3 work

Sent from my iPhone

On Aug 19, 2019, at 1:48 PM, "spoe@nisource.com" <spoe@nisource.com> wrote:

This is an **EXTERNAL** email. **STOP**. **THINK** before you CLICK links or OPEN attachments. If suspicious please click the '**Report to Incidents**' button in Outlook or forward to incidents@aep.com from a mobile device.

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Hi Dave,

We've been reviewing a draft procedure for consolidated smart thermostat rebates and wanted to see if you had any availability to meet to discuss? Let us know if you have any availability this week or early next, and we're also happy to come to your office if it's easiest. Below are some times that are available for Christine Rausch and me; please let me know if any work for you.

Tuesday, August 20: 10-12
Wednesday, August 21: after 3
Thursday, August 22: before 11
Tuesday, August 27: after 1

Thanks,
Sarah

Sarah Poe | Manager of Energy Efficiency Programs
Columbia Gas of Ohio | 290 W. Nationwide Blvd. | Columbus, OH 43215
Office: (614) 460-4632 | Cell: (614) 315-6545 | Email: spoe@nisource.com

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**Fwd: Get the new Nest Thermostat E for only $19**
Sarah Poe to: Sarah Poe 03/27/2020 12:32 PM

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Sent from my iPhone

Begin forwarded message:

**From:** "Columbia Gas of Ohio" <ColumbiaGasOhio@nisource.com>
**Date:** September 19, 2017 at 1:42:18 PM EDT
**To:** sarah_poe1001@yahoo.com
**Subject: Get the new Nest Thermostat E for only $19**
**Reply-To:** "Columbia Gas of Ohio" <ColumbiaGasOhio@nisource.com>

Get the new Nest Thermostat View in browser

# Special offer - new Nest Thermostat E for $19*

The Nest Thermostat E turns itself down when you're away. You can control it from anywhere. Its frosted disp
Ohio. Saving just got a lot easier.
Start saving today:

1. **Purchase your new Nest Thermostat E** with our rebate for $94
2. Redeem AEP Ohio's rebate separately at **www.AEPOhio.com/Rebates**
3. Install your thermostat and start saving!

**Program requirements and limitations apply. The $19 price is after rebates from both Columbia Gas of Ohio and AEP Ohio are applie*

## Kick-start your fall savings

Receive a free Home Energy Assessment by using the code **save20** when signing up. You'll get a perso
**Sign up today >**

## Save money on your next bill

Get free, personalized tips on how you can reduce your natural gas bills with our online home energy che
**Start saving today >**

## Free weatherization for income eligible customers

Every home matters, so income eligible customers can apply for our free home safety and energy service
efficient.
**Apply today >**

## Save big on natural gas furnaces, boilers and water heaters

Need new appliances? Get instant rebates on ENERGY STAR® certified natural gas boilers, furnaces ar

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**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-5. Did Columbia ever discuss the joint rebate issue with Commission Staff, particularly the problems it was having getting cooperation from First Energy and AEP? If yes, please provide the dates of those discussion and a description of the discussions.

**RESPONSE:**

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1.

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**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-6. Did Columbia ever discuss alternatives to a joint rebate program with FirstEnergy, such as getting a financial contribution towards Columbia's rebate, so that customers would get a single rebate with increased value?

**RESPONSE:**

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1.

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**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-7. Did Columbia ever discuss alternatives to a joint rebate program with AEP, such as getting a financial contribution towards Columbia's rebate, so that customers would get a single rebate with increased value?

**RESPONSE:**

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1.

**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-8. Did Columbia discuss joint marketing efforts for smart thermostats with First Energy? If yes, please describe those conversations.

**RESPONSE:**

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1, and ELPC Interrogatory Set 1, No. 3.

Columbia reached out to FirstEnergy to partner on programs, including Columbia's smart thermostat initiative, but Columbia's efforts have been unsuccessful.

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**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**INTERROGATORIES DATED MARCH 26, 2020**

INT-1-9. Did Columbia discuss joint marketing efforts for smart thermostats with AEP? If yes, please describe those conversations.

**RESPONSE:**

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1 and ELPC Interrogatory Set 1, No. 4.

Though AEP Ohio did not choose to pursue the consolidated smart thermostat rebate process, the AEP Ohio website provides its customers with a link to Columbia's Product Rebates website. Likewise, Columbia's Product Rebates page on its website provides a hyperlink to the AEP Ohio energy efficiency webpage to allow customers to take advantage of both smart thermostat programs. Please see ELPC Interrogatory Set 1, No. 9 Attachment A. Aside from this partnership, Columbia and AEP Ohio do not jointly market their smart thermostat programs together.

**We're here for you**
Our employees continue to operate to ensure all of our customers have safe, reliable natural gas service throughout the Columbia Gas Ohio area.
Learn More



Shop online to receive instant rebates or take advantage of mail-in rebates on our most popular home products: programmable thermostats, efficient showerheads and faucet aerators.

## The benefits

1. Programmable thermostats, including smart thermostats that you can adjust from your phone, can lower your energy bills.
2. Efficient showerheads can save you money on your gas and water bills.
3. Faucet aerators can save you money on your gas and water bills.

## What you could get

- ✓ $75 off the original purchase price on smart thermostats that are ENERGY STAR® certified
- ✓ $25 off the original purchase price on programmable thermostats
- ✓ $10 off the original purchase price on efficient showerheads

## Start saving today

Order Products

## Previously purchased products

## Available AEP Ohio rebates

For our customers who are also customers of AEP Ohio, you may also be eligible for smart thermostat rebates from them.

Learn More

Efficient Lighting Discounts
Rebates For Your Home
Appliance Recycling
Multifamily Program
Community Energy Savers
Community Assistance Programs
EfficiencyCrafted New Homes Program
Programs For Kids

# Apply for rebates and start saving energy and money at home.

AEP Ohio offers rebates to help bridge the gap when you make energy efficient upgrades in your home. By upgrading now, ENERGY STAR® appliances, heating and cooling systems, and other efficient upgrades can save you energy and money for years to come.

You can also visit the AEP Ohio Energy Efficiency Marketplace to compare products helping you find the most efficient model at the best price, save favorite products of interest, receive price drop alerts, and much more! Get started at https://AEPOhioMarketPlace.com/

Rebates are available for qualified ENERGY STAR® certified:

- Clothes Washers: $40
- Smart Thermostats: $25 (gas-heated homes) / $50 (electric heated homes)
- VSD Pool Pumps: $350
- Electric Heat Pump Water Heaters: $400
- Air Source Heat Pumps*: $250
- Mini-split Ductless Heat Pumps*: $300
- Geothermal Heat Pumps*: $1,000

*Heat pumps must be installed by a participating contractor. Find a contractor who can advise you on what qualified units will meet your needs here. If your contractor is not listed, please call us at 866-997-3578.

Rebate eligibility requirements:

- Equipment MUST be installed at an active AEP Ohio Residential service account.
- Limit 1 rebate for a product type per account per year.

HVAC Rebate >

## Questions?

Call us at 866-997-3578 to learn more about how simple energy upgrades make a big difference on your home's budget.

Some rebates are better together.
Get the best of both worlds with rebates from Columbia Gas and AEP Ohio.
Learn More >

**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**REQUESTS FOR PRODUCTION OF DOCUMENTS**
**DATED MARCH 26, 2020**

RPD-1-1. Please provide all meeting notes from all DSM collaborative meetings in 2017, 2018 and 2019 related to smart thermostats, including meeting dates and names of attendees.

**RESPONSE:**

Please see ELPC RPD Set 1, No. 1, Attachment A, ELPC RPD Set 1, No. 1, Attachment B, ELPC RPD Set 1, No. 1, Attachment C, and ELPC RPD Set 1, No. 1, Attachment D.

# Columbia Gas of Ohio DSM Stakeholder Group
# 290 W Nationwide Blvd
# 1-290-C
# April 17, 2017
# 9:00 am
# Meeting Minutes

**Call to Order/Welcome**
Jack Laverty called the meeting to order starting with a roll call. Jack thanked all attendees for joining the Stakeholder Group meeting and introduced Melissa Thompson for a brief welcome. Melissa thanked attendees for participating and for starting out the new six-year program with us. She noted that since 1983, DSM has been a key customer initiative for Columbia and that the company has been a leader of Best in Class in energy efficiency services for customers. Melissa noted that in addition to the natural gas reductions that customers experience, customer safety continues to be a key focus for our company and DSM programs contribute to customer safety. Melissa thanked everyone for their support.

**Stakeholders Present**
Dale Arnold (OFBF)
Hanna Balla (COH)
Evan Betterton (IGS)
Marilyn Bussard (COH)
Joe Clark (COH)
Dave Davenport (GLS)
Bill Farnsel (NHST)
Randy Hall (Cornerstone)
Brandon Jenkins (PUCO)
John Johnson Jr (GLS)
Kris Klaus (OHBA)
Jack Laverty (COH)
Megan Melby (COH)
Andrew Metz (COH)
Christina O'Keeffe (MORPC)
Scott Pigg (Seventhwave) via phone
Sarah Poe (COH)
Ron Rees (COAD)
Jim Ripke (PUCO)
Tonja Stewart (PUCO) via phone
Melissa Thompson (COH)
Robert Wolfe (PUCO) via phone

# COH DSM Stakeholder Group Meeting

April 17, 2017

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## Agenda

- Welcome and Introductions
  - Opening remarks
    - Vince Parisi, Vice President, Regulatory and Finance
    - Melissa Thompson, Director, Regulatory Policy
  - Safety moment/logistics
  - Attendance
- 2012 – 2016 DSM Program Plan, Results
- 2017 – 2022 DSM Program Plan, 2017 Progress
- Adjournment

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## Meet the Team

| Name | Title | Email |
|---|---|---|
| Adrian Andrews | WarmChoice Team Leader | aandrews@nisource.com |
| Andrew Metz | Financial & Analytics Lead | ametz@nisource.com |
| Erv McKinney | Quality Assurance Representative | emckinn@nisource.com |
| Hanna Balla | Manager of Energy Efficiency Marketing | hballa@nisource.com |
| Jack Laverty | Manager, Energy Efficiency | jlaverty@nisource.com |
| Larry Titus | Quality Assurance Representative | ltitus@nisource.com |
| Marilyn Bussard | Administrative Assistant | mbussard@nisource.com |
| Megan Melby | New Buildings Program Manager | mmelby@nisource.com |
| Paul Racher | Existing Buildings Program Manager | pracher@nisource.com |
| Sarah Poe | Manager of Energy Efficiency Programs | spoe@nisource.com |

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- Jack Laverty discussed the new team structure, including new titles for Sarah Poe and Andrew Metz.

## Overview of Columbia Gas of Ohio (COH)

- Subsidiary of NiSource, Inc.
- Investor-owned, natural gas utility
- Publicly-regulated by the PUCO
- Largest natural gas local distribution company (LDC) in Ohio
  - 61 of 88 counties
  - 1.4MM customers
  - 19,000 miles of distribution main

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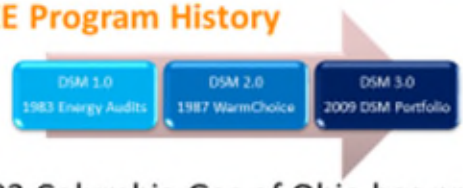
## COH DSM/EE Program History




- Since 1983 Columbia Gas of Ohio has provided EE services to its customers
  - 1983: Residential Conservation Service (RCS) Energy Audits (Operation Home Check)
    - 1986: Columbia Ohio Weatherization Program
  - 1987: WarmChoice®
  - 2009: DSM Portfolio
    - 2012: DSM Program expansion/continuation
    - 2016: DSM Program expansion/continuation

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## DSM/EE Program Approach

- Use building science to safely create savings for customers
- Accelerate energy efficiency services to customers
- Maintain/improve customer satisfaction with programs
- Continue energy efficiency as a core competency of Columbia Gas of Ohio
- Execute Best Practice/Best-in-Class Portfolio of Programs

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## 2012-2016 DSM Program Plan – Review

- Case # 11-5028/5029-GA-AAM
- Application: 9/9/2011
- Joint Recommendation and Stipulation: 10/28/2011
- Finding and Order: 12/14/2011
- 5-year plan – 2012-2016
  - ~$29M/year
  - Continuity of services for customers
  - Stability for business partners
- Annual inflation adjustment built into budgets
- Shared savings
  - Incentivizes overachievement of energy savings targets in DSM portfolio

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## AGA Nationwide Natural Gas DSM Expenditures

### Commitment to Energy Efficiency

- At the state and national level, natural gas energy efficiency programs continue to grow.

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## Some Multiple Benefits of DSM/EE

- Safety
- Health & well-being
- Employment
- Poverty alleviation
- Disposable income
- Building durability
- Energy savings
- GHG emissions reduced
- Energy security
- Energy delivery
- Energy prices
- Macroeconomic impacts
- Local air pollution
- Resource management
- Public budgets
- Asset values
- Resiliency

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## DSM Programs

| Name in 2012-2016 Finding and Order | Updated Program Name |
|---|---|
| Behavior Modification/Home Energy Reports | Home Energy Efficiency Reports |
| Energy Design Solutions | Small Commercial Construction |
| Energy Efficiency Education for Students | $e^3$ smart |
| Energy Efficient New Homes | EfficiencyCrafted™ Homes |
| EPA Portfolio Manager | EPA Portfolio Manager |
| High Efficiency Heating System Rebates | Appliance Rebates |
| Home Performance Solutions | Home Energy Audit and Rebates |
| Innovative Energy Solutions | Innovative Energy Solutions |
| On-Line Energy Audit | Home Energy Efficiency Checkup |
| Residential Code Training | EfficiencyCrafted™ Homes |
| Simple Energy Solutions | Simple Energy Solutions |
| WarmChoice® | WarmChoice® |

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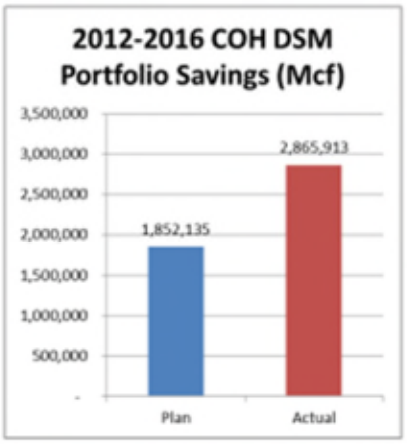
- Jack noted that some programs renamed to align with program names used in contracts.

## 2012-2016 DSM Program Plan – Savings Target Results

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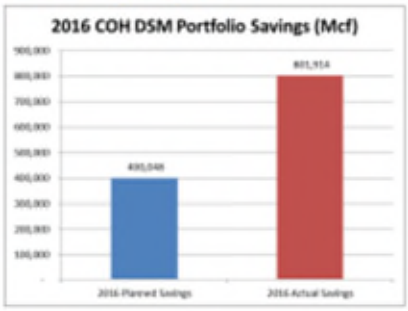
- Jack noted that the 5 year DSM plan completed in 2016 had exceeded its natural gas savings goals.

## 2016 DSM Program – Metrics and Highlights

- 0 accidents
- Customer H&S
- Exceeded plan natural gas savings target
  - Mcf savings, lifetime: 8,842,498
  - Reduced tons $CO_2$, lifetime: 525,556
  - Customers served: 434,532
- Exceeded quality assurance inspection goals




- Community partnerships
  - Nelsonville
  - Athens County GUEP
  - Oberlin GUEP
  - Portsmouth
  - Findlay
  - Bowling Green

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- Jack discussed some of the overall highlights of the 2016 program year, referencing the above slide.

## Home Energy Audit and Rebates – 5-Year Highlights

Program Manager: Paul Racher

- Diagnostic, computerized energy audits
- Rebates on Energy Efficiency Upgrades:
  - Attic insulation
  - Wall insulation
  - Air sealing
  - High efficiency furnaces
  - Identified 15,573 safety issues in customers' homes since 2012
    - Detected 31 interior gas leaks in 2016
    - 420 combustion safety issues in 2016
    - 1,155 Mold and Moisture issues in 2016

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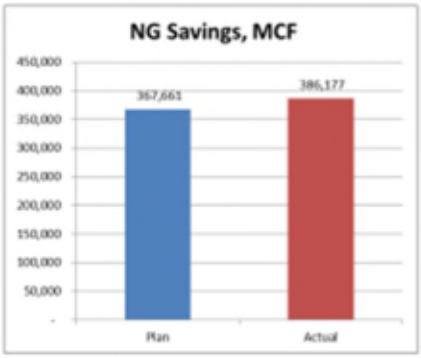
- Jack discussed the highlights of the Home Energy Audit and Rebates (HEAR) program in the above slide. In addition to the energy efficiency measures installed in the program, thousands of health and safety issues were identified in customers' homes during energy audits.

## Home Energy Audit and Rebates – 5-Year Highlights

- 105% of NG Savings Target

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- The HEAR program exceeded it natural gas savings target.

## WarmChoice® – 5-Year Highlights

Program Manager: Adrian Andrews

- LI Customer whole house weatherization program
- One stop shop for leveraging EE, housing, and social services
- National/Regional/State award winning program
- Customer Satisfaction Surveys (scale 1-5, 5 highest)
  - Customer Satisfaction, 88% rate it 4-5
- Health and Safety Inspections
  - 8,383 issues identified
    - 843 interior gas leaks
    - 2,173 cracked heat exchangers
    - 4,707 venting issues

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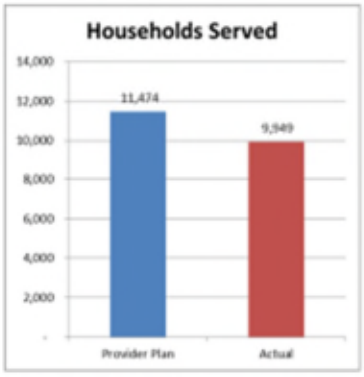
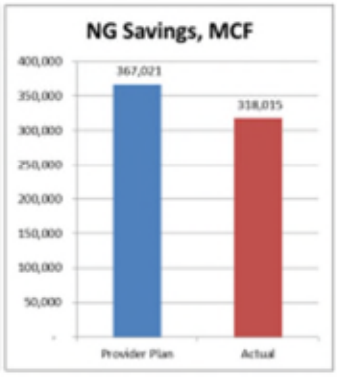
- Jack reviewed the accomplishments of WarmChoice in the slide above, including some of the non energy benefits of health and safety issues discovered in customers' homes during WarmChoice inspections.

## WarmChoice® – 5-Year Metrics

- NG Savings Target: 88% of Provider Plans

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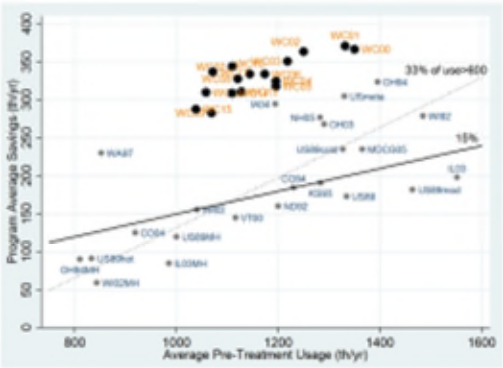
- The WarmChoice program served nearly 10,000 customer households.

## WarmChoice® – Metrics




- Comparison to other low-income weatherization programs
- Average Cost Per Home
  - HWAP - $10,000+
  - WarmChoice - $5,307

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- Jack noted in the slide that WarmChoice continues to have the highest natural gas savings of any income eligible residential customer weatherization program in the nation and that the average cost per homes is nearly ½ that of the Home Weatherization Assistance Program.

## Simple Energy Solutions – 5-Year Highlights

Program Manager: Paul Racher

- Energy Efficiency Upgrades
  - EE Showerheads
  - EE Aerators
  - Programmable Thermostats
- Valpak, On-Bill Messaging, Community Coupon Books successful
- Satisfaction Survey, 1-5 scale with 5 highest
  - Products: 4.56
  - Program: 4.61
  - Purchase Effort: 4.61

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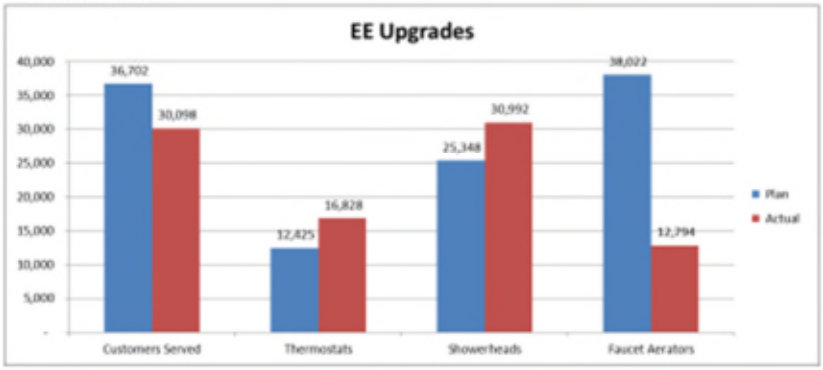
- Jack reviewed the Simple Energy Solutions (SES) program and some of its outcomes.

## Simple Energy Solutions – 5-Year Metrics

- 135% thermostats, 122% showerheads, 33.6% aerators

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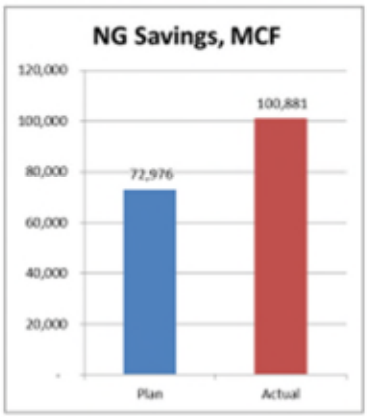
- SES exceeded its natural gas savings targets for all energy efficiency upgrades but faucet aerators.

## Simple Energy Solutions – 5-Year Metrics

- 138% of NG Savings Target

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- For the period 2012-2016, SES far exceeded its natural gas savings target.

## Appliance Rebates – 5-Year Highlights

Program Manager: Paul Racher

- Successful 4th year
- 197 participating contractors; training and program requirements
- $300 instant discounts on furnaces with AFUE ≥ 96%; $350 instant discounts on boilers with AFUE ≥ 90%

ENERGY STAR

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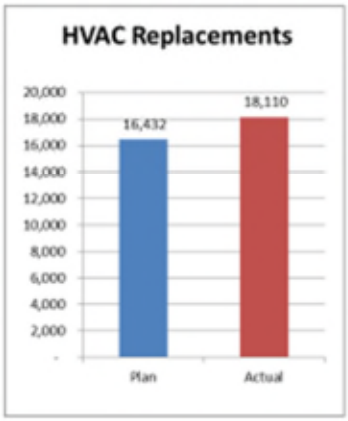
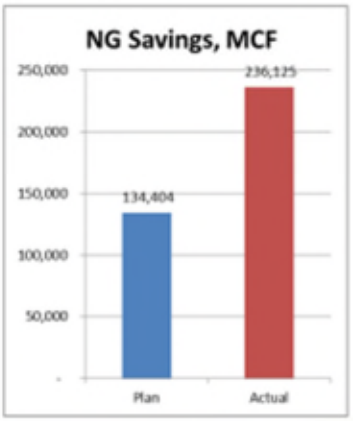
- Jack noted that the program was fully launched in 2013 and mentioned that going forward, the furnace/boiler EE upgrades would require EnergyStar certification.

## Appliance Rebates – 5-Year Metrics

- 110% of Customers; 176% of NG Savings Target

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- The appliance rebates program exceeded its 5 year goals.

- Jack reviewed some key points about the EfficiencyCrafted Homes (ECH) program.

## EfficiencyCrafted™ Homes – 5-Year Highlights

- 2012 to 2013 ENERGY STAR Partner of the Year
- 2014 to 2017 ENERGY STAR Sustained Excellence Partner of the Year
- 2012 to 2016 ENERGY STAR Market Leader Award

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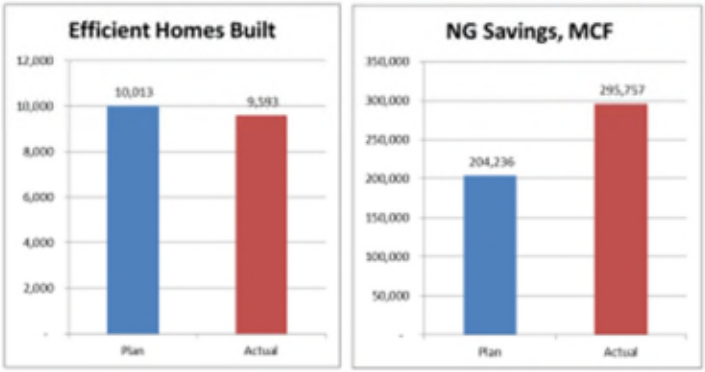
- Jack reviewed some of the awards that ECH received.

## EfficiencyCrafted™ Homes – 5-Year Metrics

- 96% of Homes Built; 145% of NG Savings Target
  - 4,230 ENERGY STAR Certified homes

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- ECH exceeded its natural gas saving targets for the 5 year period.

## e³ smart – 5-Year Highlights

Program Manager: Megan Melby

- Energy education curriculum delivered to students in 4-12 grade classes
- Partnership/cost share with AEP in jointly served counties; stand alone program elsewhere
- 415 schools, 697 teachers participated
- Students get a kit of energy efficiency materials to install; installation rates surveyed
- Scratch-N-Sniff cards in each kit

OHIO energy PROJECT

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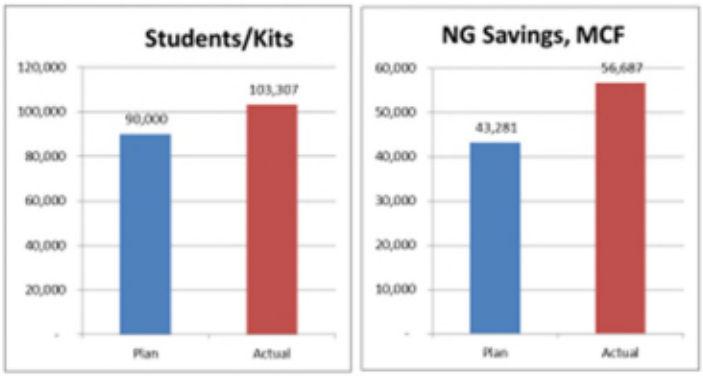
- Jack discussed the e3smart program items above.

## e³ smart – 5-Year Metrics

- 115% of Students; 131% of NG Savings Target

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- Jack noted the great program accomplishments of e3smart and discussed why it is an important education opportunity to reach children on conservation in an early part of their lives

## Home Energy Efficiency Reports – 5-Year Highlights

Program Manager: Megan Melby

- Compare customers' home energy use to similar homes; comparison motivates customers to take action
- High customer acceptance
  - Low opt out rate
  - Low dissatisfaction due to up front communications and strategic report design modifications
- Customer segmentation
  - Target customers with appropriate energy efficiency program messages based on their annual usage, income level, and past COH EE program participation

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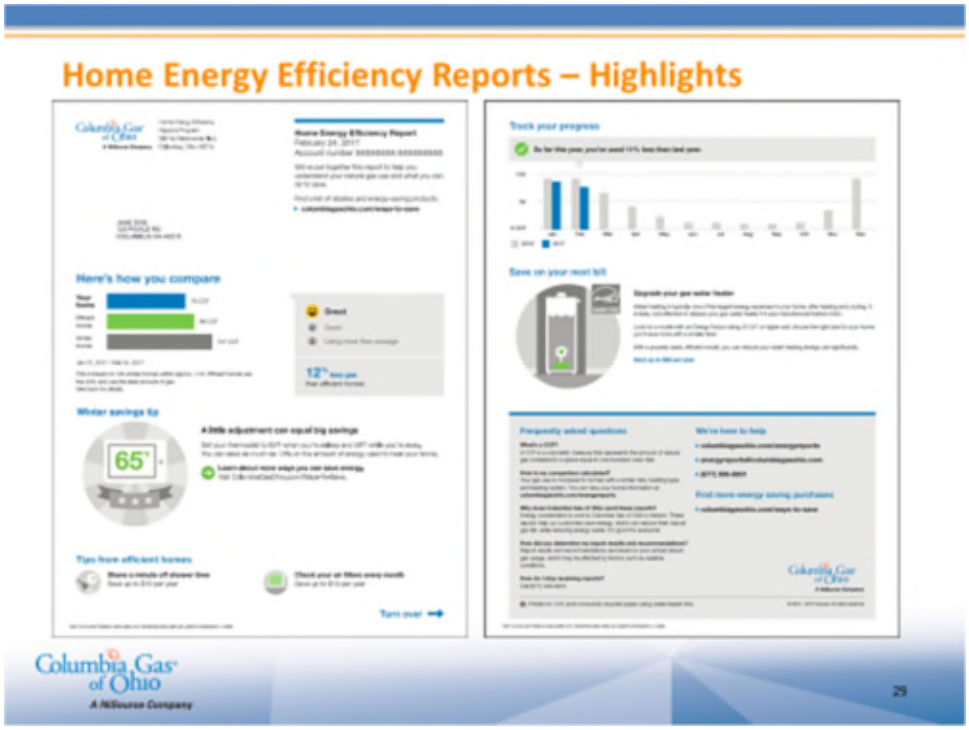
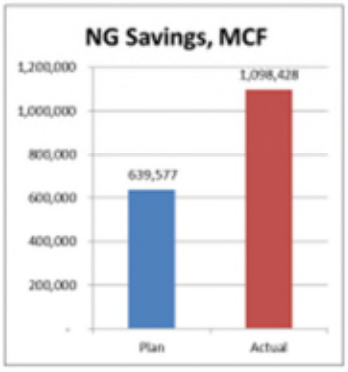
- Jack noted that the Home Energy Efficiency Reports (HEER) program continued to focus on customized messages to customers based on segmentation.
- Jack also noted that Oracle purchased OPower.




- Jack discussed some of the report elements and why it was an important and effective way to engage customers in energy efficiency.

## Home Energy Efficiency Reports – 5-Year Metrics

- 246% of Customers; 172% of Savings Target

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- Jack noted the high level of success of the HEER program over the 5 year DSM period.

## Home Energy Efficiency Checkup – Highlights

Program Managers: Megan Melby & Paul Racher

- On-line, user friendly energy audit
- Customized recommendations for Columbia's EE programs and tips
- ColumbiaGasOhio.com/checkup
- 7,050 on-line energy audits; 6,774 were referred to a COH EE program

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- Jack reviewed the on line energy audit tool, Home Energy Efficiency Checkup (HEEC).

## Innovative Energy Solutions – 5-year Highlights

Program Manager: Paul Racher

- Eligible Customers
  - Non-Profits
  - Houses of Worship
  - Public buildings
  - Businesses/Farms
- EE Measures
  - Energy Audits
  - Custom Rebates
  - Prescriptive Rebates
  - More than 75% of ECMs were to schools, churches, libraries, medical centers, and small businesses.

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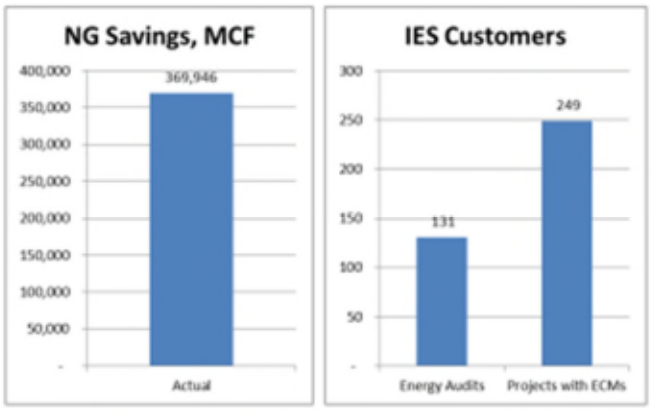
- Jack discussed the energy audit requirements and some of the prescriptive energy efficiency upgrades offered.
- Ron Rees of COAD inquired whether through this program we're able to coordinate with property assessment funding out in marketplace. Jack noted that we had partnered with the Franklin Co Finance Authority on a project, and that there was continued coordination with the Toledo Port Authority.

## Innovative Energy Solutions – 5-Year Metrics

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- The Innovative Energy Solutions (IES) program was successful in serving customers and delivering natural gas savings.

## EPA ENERGY STAR® Portfolio Manager – Highlights

- Ohio Interfaith Power and Light
- Ohio Hospital Association
- City of Columbus
- https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager

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- Jack discussed the COH partnership with the Ohio Hospital Association through which we provided quarterly (now monthly) usage data to help them benchmark the energy use of their members' hospital buildings. He also discussed partnerships with the city of Columbus and Ohio Interfaith Power and Light.

## Small Commercial Construction – Highlights

Program Manager: Megan Melby

- 28 training sessions held on building more efficient than commercial code, including information on COH energy efficiency incentives
- 243 attendees, consisting of developers, equipment distributors, engineers, architects, construction managers and other design professionals.
- 4,128 Mcf saved for 9 projects.

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- Jack discussed key outcomes for the Small Commercial Construction energy efficiency program.

## 2017-2022 DSM Program Progress

- Smart thermostat rebates; discussions with AEP
- Walk through Energy Assessments
- Home Performance with ENERGY STAR alignment
- Direct install multi-family
- Appliance rebates: complete Energy Star alignment
- Collaboration with AEP on EPA Portfolio Manager

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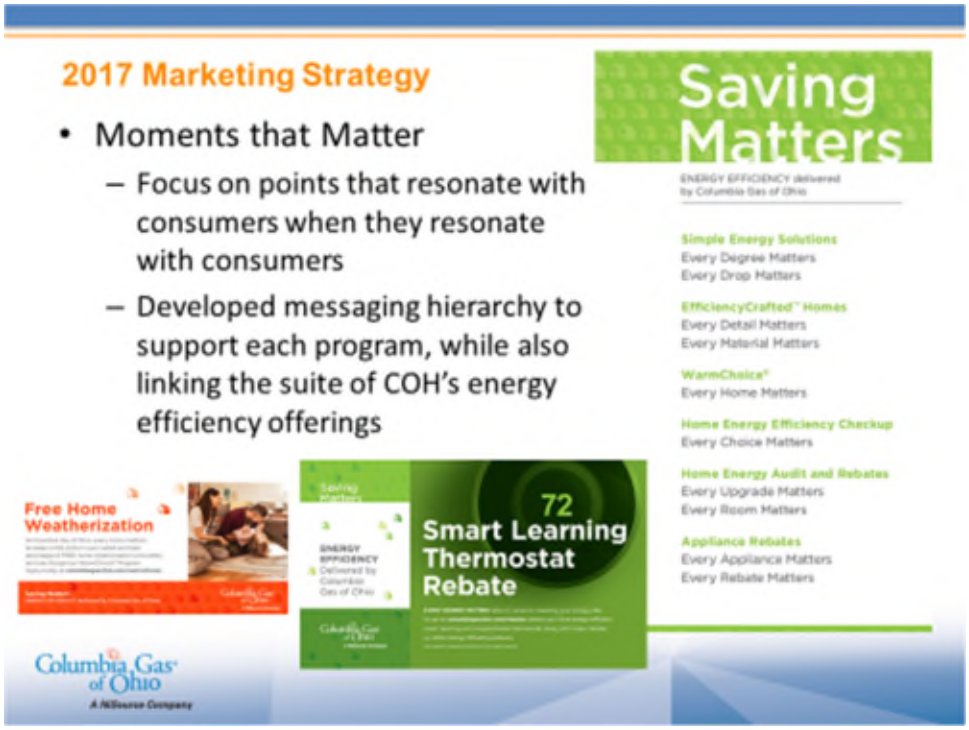
- Jack discussed some important opportunities for the 2017-2022 DSM Program, including
  - Working with AEP to make rebate seamless process
  - Launching walk through energy audit – quicker (2 hr vs 4 hr) process
  - Multi-family energy efficiency in coordination with AEP
  - Energy Star alignment increasing opportunities to deliver more savings to customers




- Jack reviewed some of the key aspects of marketing energy efficiency programs to customers in the slide above.

## 2017 Marketing Strategy

- Marketing and customer segmentation
  - Targeting customers
    - Savings potential
    - Demographics
    - Prior actions
- Testing and Optimization
  - Testing messages
  - Reviewing metrics
  - Adjusting creative and messaging based on performance

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- Jack discussed additional facets of the energy efficiency marketing approach.

## 2017 Marketing Strategy

- Digital Marketing
  - Introduced digital marketing strategies mid-2016
    - Search/PPC
    - Display ads
    - Social media marketing
    - YouTube pre-roll
    - Pandora radio
  - Cost effective and measurable
    - Increased average monthly web visits to HEA/R's web page by more than 300%
  - Optimize customer's experience online
    - More than 900 form requests through HEA/R's web page from July – December 2016.

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- Jack discussed some of the successes of the marketing campaign that will continue in 2017.

## 2017 Opportunities and Challenges

- Potential Challenges
  - State of Ohio DOE/HHS Home Weatherization Assistance Program (HWAP) coordination and/or federal funding
  - Energy Star support and/or funding at Federal level
  - Warm winters

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- Jack discussed some of the challenges facing energy efficiency, including:
  - Coordination with federal funding sources.
  - Potential administration changes to Energy Star.
  - Warmer than typical versus cold winter weather impacts on customer engagement in energy efficiency.

## 2017 Opportunity: Energy Efficiency Team Structure

- DSM Team realigned and rebranded as the Columbia Energy Efficiency Team.
- Sarah Poe promoted to the Manager of Energy Efficiency Programs
  - Sarah will work with program managers to execute their program requirements and work with program implementation consultants
- Andrew Metz promoted to the Financial and Analytics Lead
  - Andrew will provide both budgetary support and supervision for all programs, and will oversee program measurement and metrics

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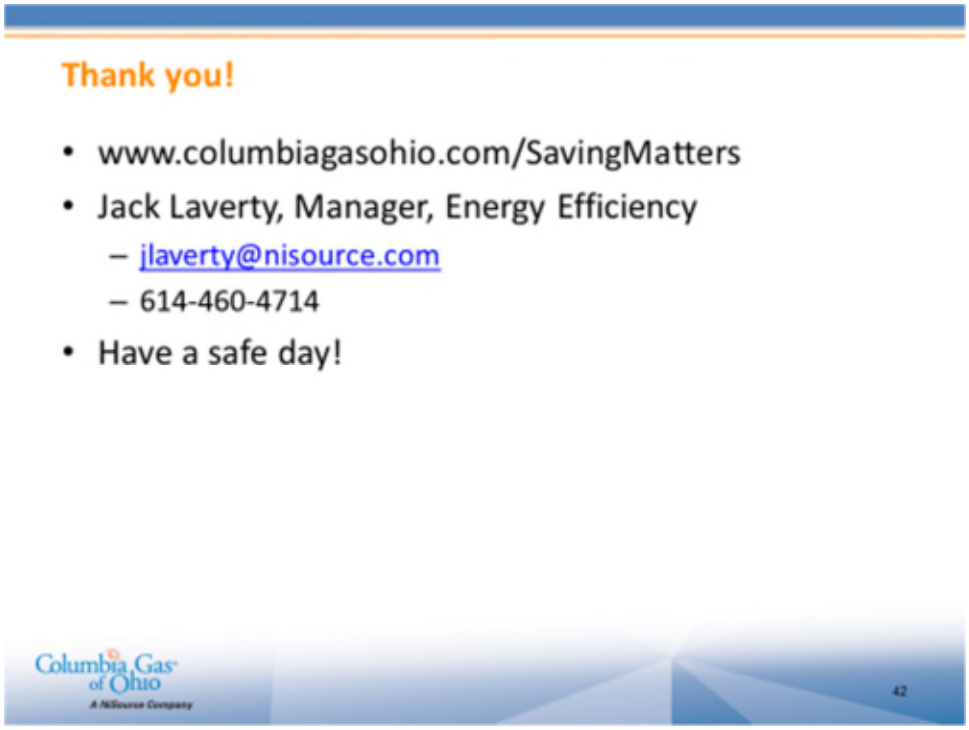
- Jack noted the structural changes to the COH DSM team and its renaming to Energy Efficiency.




- Jack thanked participants for their support in 2012-2016 as well as for the next 6 years.
- Ron Rees expressed thanks to Columbia Gas of Ohio and to the PUCO for the support of energy efficiency. He noted that his organization and its member agencies see firsthand the difference that weatherization and DSM programs make for customers and discussed an example of a Nelsonville food pantry that was helped by Columbia Gas and AEP to make it more energy efficient. Ron added that he appreciated opportunities to help customers and the fact that the PUCO enabled the programs to continue. He also emphasized that his organization and member agencies see so many unsafe situations in customers' homes and that health and safety are an equally important part of programs because people do what they need to do to keep warm. He said that the program makes huge difference, and that it just doesn't save energy – it also saves lives.
- Jack added that the food pantry had two apartments above that qualified for WarmChoice weatherization and that the food pantry was able to serve 500 more meals due to the savings from energy efficiency.
- Jack asked participants for any questions. Hearing none, Jack adjourned the meeting.

# Columbia Gas of Ohio DSM Stakeholder Group
# 290 W Nationwide Blvd
# 1-290-C
# April 27, 2018
# 10:00 am

## Meeting Minutes

## Call to Order/Welcome

Jack welcomed attendees to the DSM Stakeholder Group meeting. Andrew Metz was introduced to lead a safety moment. As April is National Distracted Driving Awareness month, Andrew explained the three types of distracted driving (visual/ manual/cognitive (mind). After roll call, Vince Parisi opened by thanking attendees for their time and stating energy efficiency is critical part of his team as the mission of Columbia Gas is to provide safe, reliable, and affordable natural gas to customers. Columbia Gas has led way since 1983 in driving EE programs for customers. Vince then introduced Melissa Thompson who welcomed participants and stated that 2017 was a great year. Along with the savings for customers, we're making it safer for customers. Melissa also brought up engagement with customers with our new digital EE marketing campaign and the new look for marketing materials.

## Stakeholders Present

Adrian Andrews (COH)
Marilyn Bussard (COH)
Joe Clark (COH)
William Farnsel (NeighborWorks Toledo)
Steve Garnack (MORPC)
Chris Healey (OCC)
John Johnson, Jr (GLS)
Kris Klaus (OHBA)
John Laverty (COH)
Andrew Metz (COH)
Debbie Ohler (OBBS) via phone
Vince Parisi (COH)
Nicole Peoples (COAD)

Sarah Poe (COH)
Christine Rausch (COH)
Jim Ripke (PUCO)
Michael Sachs (NeighborWorks Toledo)
Jeff Starkey (Atlas Butler)
Melissa Thompson (COH)

April 27, 2018

# COH DSM Stakeholder Group Meeting

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## Agenda

- Safety Moment
- Welcome and Introductions
  - Introductions
  - Opening remarks
    - Vince Parisi, Vice President, External & Customer Affairs
    - Melissa Thompson, Director, Regulatory Policy
- 2017 DSM Program
- Adjournment

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- Jack Laverty welcomed the Stakeholder Group to the meeting and reviewed the agenda.

**April is National Distracted Driving Awareness Month**

- Three types of distractions:
  - Visual
    - Any time the driver takes their eyes off the road
  - Manual
    - Any time the driver takes their hands off the wheel
  - Cognitive
    - Any time the driver takes their mind off driving

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- Andrew Metz discussed the importance of safety in our work and personal lives, and distracted driving in particular.

## COH DSM/EE Program History

- Since 1983 Columbia Gas of Ohio has provided EE services to its customers
  - 1983: Residential Conservation Service (RCS) Energy Audits (Operation Home Check)
  - 1986: Columbia Ohio Weatherization Program
- 1987: WarmChoice®
- 2009: DSM Portfolio
- 2012: DSM Program expansion/continuation
- 2017: DSM Program expansion/continuation

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- Jack Laverty reviewed the history of the DSM programs at COH.

## Meet the COH EE Team

| Name | Title | Email |
|---|---|---|
| Adrian Andrews | WarmChoice Team Leader | aandrews@nisource.com |
| Andrew Metz | Financial & Analytics Lead | ametz@nisource.com |
| Chris Rausch | Existing Buildings Program Manager | crausch@nisource.com |
| Erv McKinney | Quality Assurance Representative | emckinn@nisource.com |
| Hanna Balla | Manager of Energy Efficiency Marketing | hballa@nisource.com |
| Jack Laverty | Manager, Energy Efficiency | jlaverty@nisource.com |
| Larry Titus | Quality Assurance Representative | ltitus@nisource.com |
| Marilyn Bussard | Administrative Assistant | mbussard@nisource.com |
| Sarah Poe | Manager of Energy Efficiency Programs | spoe@nisource.com |
| Vacant | New Buildings Program Manager | spoe@nisource.com |

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- Jack introduced the EE team members.

## COH DSM/EE Program Approach

- Use building science to safely create savings for customers
- Accelerate energy efficiency services to customers
- Maintain/improve customer satisfaction with programs
- Continue energy efficiency as a core competency of Columbia Gas of Ohio
- Execute Best Practice/Best-in-Class Portfolio of Programs

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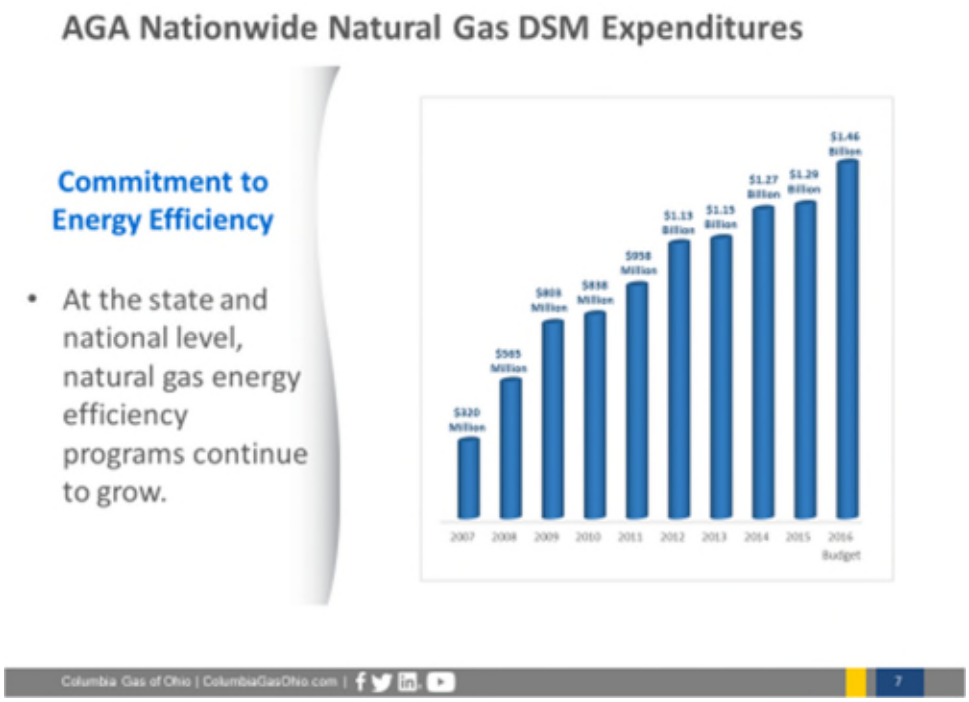
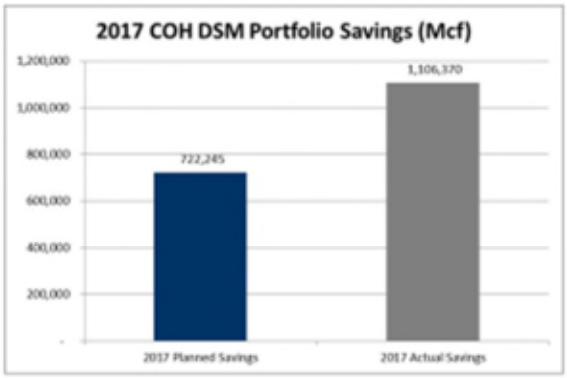
- Jack discussed the COH EE program philosophy, including “Safety first” and “do no harm” as the hallmarks of COH EE programs.
- The COH EE programs have high customer satisfaction results from a variety of survey tools.




- Jack mentioned the continued support of EE at natural gas utilities throughout the nation.

## 2017 DSM Program – Metrics and Highlights

- Exceeded planned natural gas savings target
  - Mcf savings, lifetime: 12,694,807
  - Reduced tons $CO_2$, lifetime: 76,169
  - Customers served: 598,329

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- Jack reviewed high level DSM stats for the 2017 program portfolio.

## 2017 DSM Program – Metrics and Highlights

- Health and Safety Statistics

| H&S Description | # Homes |
|---|---|
| Asbestos | 243 |
| Combustion Safety | 506 |
| Cracked Heat Exchanger | 637 |
| Gas Leaks | 160 |
| Mold & Moisture | 1,213 |
| Venting Issues | 1,505 |
| Wiring Issues | 532 |

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- Jack discussed that in some homes, health and safety items need to be mitigated before we can start EE work.

## WarmChoice® – Highlights

Program Manager: Adrian Andrews

- LI Customer whole house weatherization program
- One stop shop for leveraging EE, housing, and social services
- National/Regional/State award winning program
- Customer Satisfaction: 9.64/10
- Health and Safety Inspections
  - 112 interior gas leaks
  - 637 cracked heat exchangers
  - 1,505 venting issues

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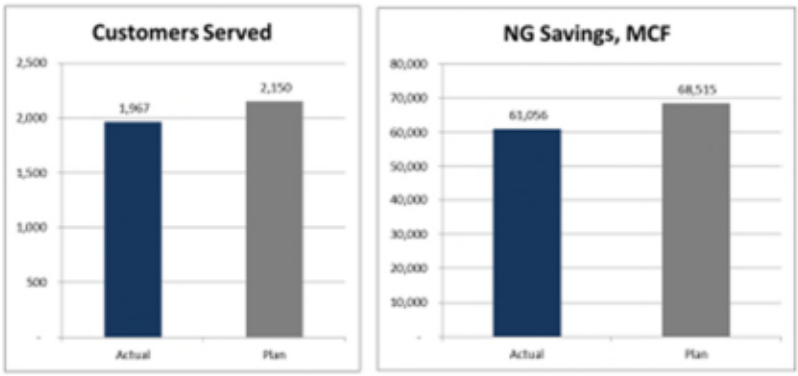
- Adrian Andrews presented the WarmChoice results. She has been with WarmChoice since its inception in 1987.
- Adrian indicated that she and Sarah Poe were presenting about the program at the ACEEE summer study in August.
- Adrian noted the leadership of the WarmChoice providers Jack Laverty noted that Nicole Peoples (COAD) was appointed by US Department of Energy Secretary Perry to the State Energy Advisory Board for DOE.

## WarmChoice® – Metrics

- NG Savings Target: 95% of Customers and Savings






- Adrian indicated that it takes effective marketing to create customer awareness and participation.

## WarmChoice - Program Impact

### S. Murphy – Groveport

- Permanent injuries from a car accident
- Struggling with bills and home maintenance
- Tired and sick - carbon monoxide present
- Furnace replacement, insulation and air sealing
- Lower utility bills and a safer, more comfortable home

**Ms. Murphy, a volunteer and neighborhood leader, is certain the WarmChoice program saved her life.**



- Adrian presented some customer stories and mentioned that the providers conduct a program open house at the home of a customer who received services. This customer participated in a program open house.

## WarmChoice - Program Impact

**M. Ackley, Nelsonville, Ohio**

- Living primarily in the dining room
- Furnace, water heater, air sealing, sidewall and attic insulation

From a home that wasn't safe or comfortable to having a home to enjoy and feel safe in. Her quality of life has improved.

*"I feel peace of mind knowing my home is safe and prepared for cold winter weather." -**M. Ackley: Mom, Grandma, friend, and good neighbor***



- Adrian discussed the customer experience with WarmChoice as part of the COH weatherization initiative in Nelsonville, Ohio.

## WarmChoice - Program Impact

**M. Christian, Oberlin, Ohio**

- Without hot water for several years
- Hot plate and mini fridge
- Hesitant to ask for or accept help
- Furnace, water heater, refrigerator, gas cook stove, insulation and additional EE measures provided by HWAP, WarmChoice and POWER

*"I am at a point in my life where I am preparing for the next stage. The insulation, the furnace…these services will allow me to stay in my home."* ***– M. Christian: Advocate, Historian, Author, Dance Instructor, and Social Worker***

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- Adrian was asked whether WarmChoice does any long-term follow up of customers to see how they're doing later. Adrian responded we follow up with impact evaluation for savings but really don't have process for going back except for post-weatherization inspections of the work quality and customer experience. Letters are sometimes received by customers as well as additional requests for other resources. Jack Laverty noted that COH has performed persistence studies in the past, and that over time the energy savings results are remarkably consistent.

## Simple Energy Solutions – Highlights

Program Manager: Chris Rausch

- Energy Efficiency Upgrades
  - EE Showerheads
  - EE Aerators
  - Smart and Programmable Thermostats
- Nest and ecobee rebate specials
- Exceeded smart thermostat goals

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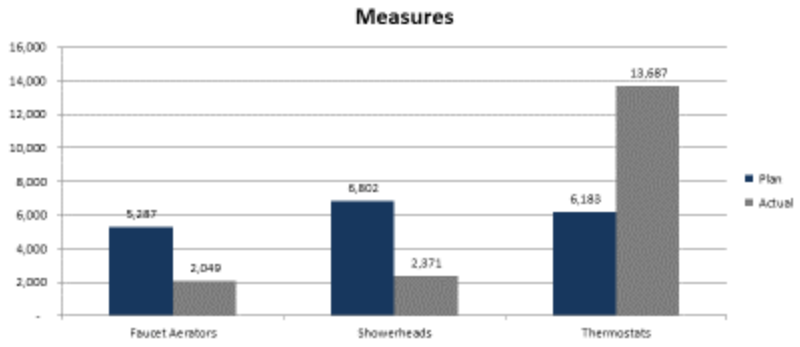
- Andrew Metz reviewed the EE upgrades that customers could receive through SES and some of the successes for 2017.

## Simple Energy Solutions – Metrics

- 221% thermostats, 35% showerheads, 39% aerators

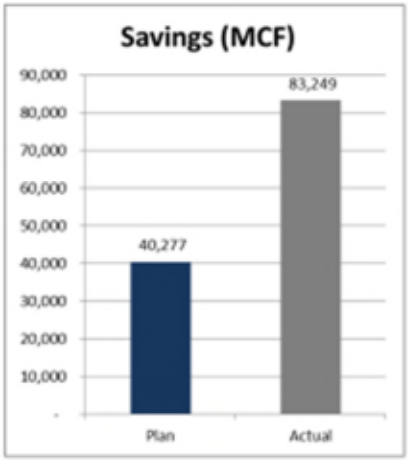





- Andrew reviewed the success with programmable/smart thermostats and the energy savings that resulted from that success.

## Simple Energy Solutions – Metrics

- 207% of NG Savings Target

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- Andrew reviewed the savings slide and the fact that the program far exceeded its natural gas savings goal.

## Appliance Rebates – Highlights

Program Manager: Chris Rausch

- Successful 5th year
- 183 participating contractors; training and program requirements
- $300 instant discounts on furnaces with AFUE ≥ 96%; $350 instant discounts on boilers with AFUE ≥ 90%
- $50 instant discounts on water heaters with an EF ≥ .67; $100 instant discounts on tankless water heaters with an EF ≥ .91

ENERGY STAR

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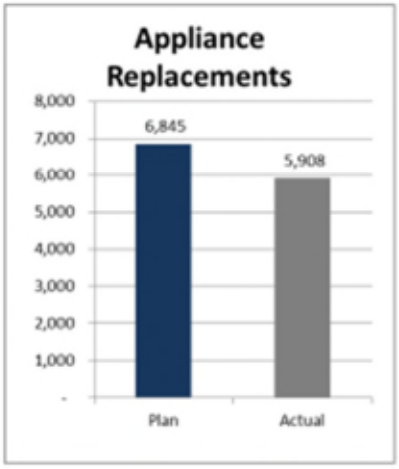
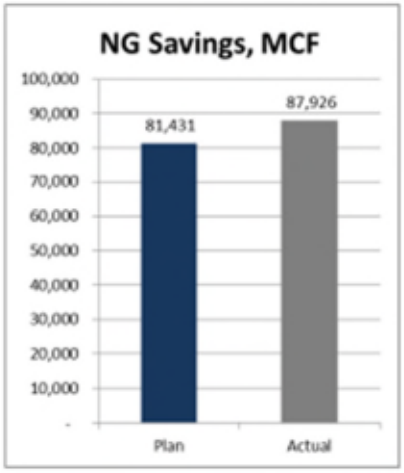
- Andrew reviewed the program rebates and some of the program criteria. COH started offering tank water heater and tankless water heater rebates in program this year

## Appliance Rebates – Metrics

- 86% of Customers; 108% of NG Savings Target

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- Andrew remarked that the savings target was exceeded because customers purchased appliances with higher efficiencies than expected.

## Home Energy Audit and Rebates – Highlights

Program Manager: Chris Rausch

- Diagnostic, computerized energy audits
- Rebates on Energy Efficiency Upgrades:
  - Attic and Wall insulation
  - Air sealing
  - High efficiency furnaces
  - Identified 2,323 safety issues in customers' homes
    - Detected 48 interior gas leaks
    - 506 combustion safety issues
    - 1,213 Mold and Moisture issues
- Customer Satisfaction: 9.28/10

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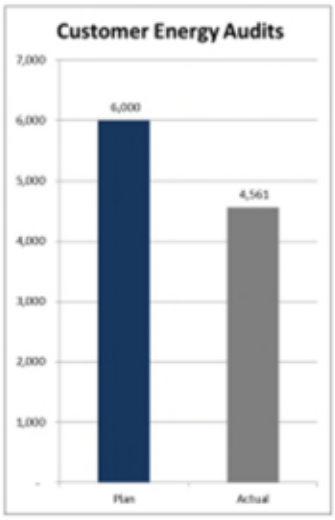
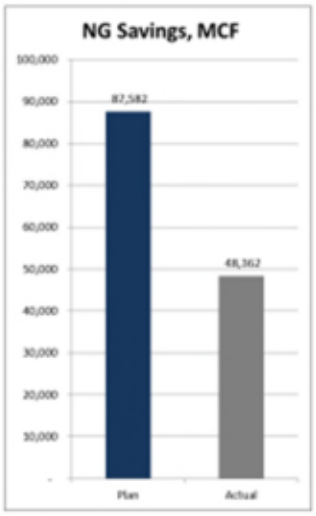
- Andrew reviewed the HEAR program with the stakeholder group and the excellent customer satisfaction the program had achieved.

## Home Energy Audit and Rebates – Highlights

- 76% of Customer Target

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- Andrew discussed the 2017 program performance.

## EfficiencyCrafted™ Homes – Highlights

Program Manager: Megan Melby

- Incentives to build homes better than code; some homes have been built nearly 70% better than code
- 70 builders participating
- USEPA Energy Star Award Partner of the Year since 2012

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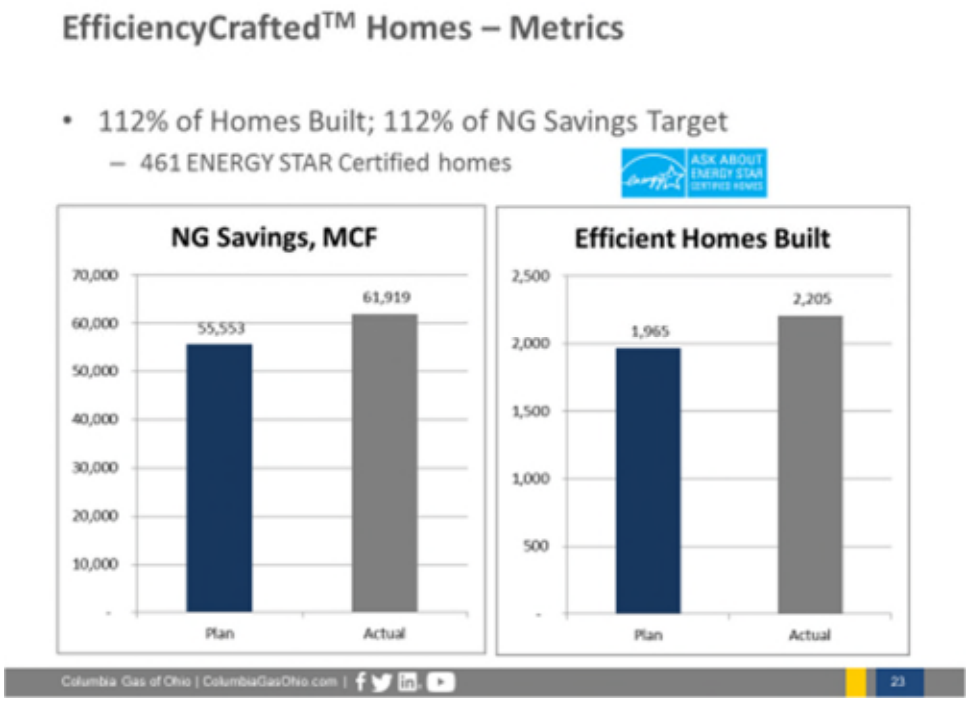
- Sarah Poe reviewed the ECH program and informed the stakeholder group that this program received Energy Star Award Partner of the Year for 2018.




- Sarah reviewed the program metrics.
- Melissa Thompson asked about the difference in EfficiencyCrafted and ENERGY STAR certified home; Sarah stated that there were extra steps needed for ENERGY STAR certification. In addition to having ENERGY STAR appliances, ENERGY STAR homes also must meet additional criteria.

## $e^3$ smart – Highlights

Program Manager: Megan Melby

- Energy education curriculum delivered to students in 4-12 grade classes
- Partnership with AEP in jointly served counties; stand alone program elsewhere
- 221 schools, 309 teachers participated
- Students get a kit of energy efficiency materials to install; installation rates surveyed
- Scratch-N-Sniff cards in each kit

OHIO energy PROJECT

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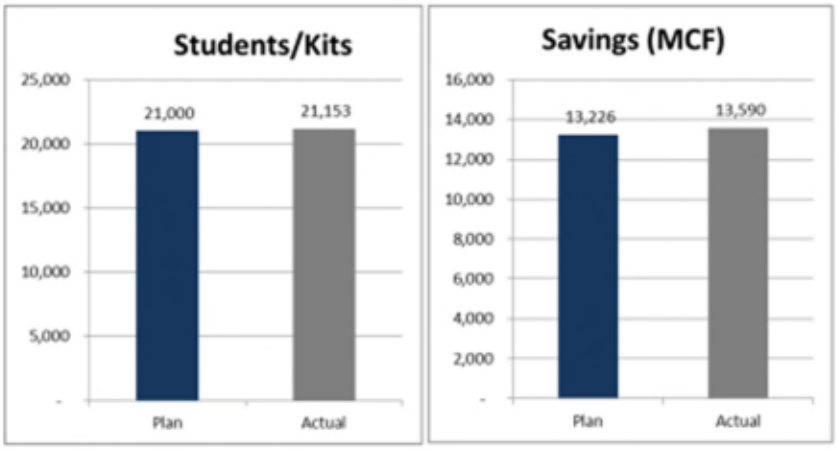
- Sarah Poe reviewed the program with the stakeholder group.
- The purpose of the program is to train participating teachers to provide education to students about energy efficiency. The curriculum is approved by the state of Ohio, Department of Education.

## e³ smart – Metrics

- 101% of Students; 103% of NG Savings Target






- Sarah reviewed the program metrics with the stakeholder group.

## Home Energy Efficiency Reports – Highlights

Program Manager: Megan Melby

- Compare customers' home energy use to similar homes; comparison motivates customers to take action
- High customer acceptance
  - Low opt out rate
  - Low dissatisfaction due to up front communications and strategic report design modifications
- Customer segmentation
  - Target/segment customers with appropriate energy efficiency program messages based on their annual usage, income level, and past COH EE program participation

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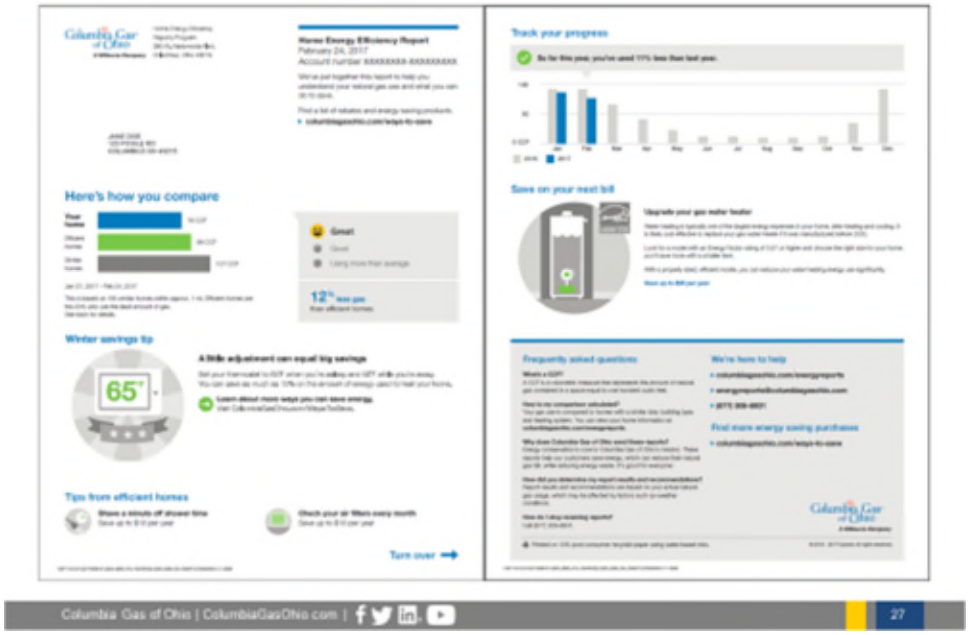
- Sarah Poe reviewed the HEER program with the stakeholder group. Jack Laverty commented we've been working with Opower for a while and we're first utility to further segment customers so that energy efficiency messages are applicable to them and their home which also enabled us to market our programs through the reports.
- Chris Healey asked about customer segmentation by income level. Sarah responded that in the instance of PIP customers they may qualify for WarmChoice program and could be provided with specific energy efficiency tips.

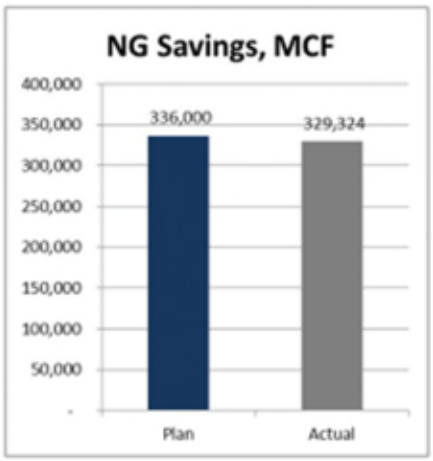
## Home Energy Efficiency Reports – Highlights




- Sarah reviewed the report structure with the stakeholder group.

## Home Energy Efficiency Reports – Metrics

- 126% of Customers; 98% of Savings Target

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- Sarah reviewed the program metrics and mentioned that the program added more customers in 2017.

## Home Energy Efficiency Checkup – Highlights

Program Manager: Chris Rausch

- Online, user friendly energy audit
- Additional EE on ramp for customers
- Customized tips and recommendations for Columbia's EE programs
- ColumbiaGasOhio.com/checkup
- 7,720 online energy audits; 6,938 were referred to a COH EE program

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- Andrew reviewed the HEEC program and the advantages of an on-line energy audit for customers who did not want someone in their house for a comprehensive energy audit.

## Innovative Energy Solutions – Highlights

Program Manager: Chris Rausch

- Eligible Customers
  - Non-Profits
  - Houses of Worship
  - Public buildings
  - Businesses/Farms
- EE Measures
  - Energy Audits
  - Custom Rebates
  - Prescriptive Rebates

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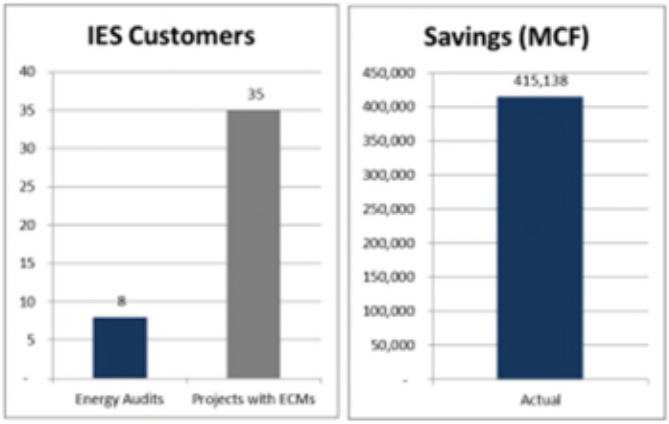
- Andrew discussed the energy efficiency upgrades available to eligible customers.

## Innovative Energy Solutions – Metrics






- Andrew reviewed the program metrics.

## Small Commercial Construction – Highlights

Program Manager: Megan Melby

- Training sessions held on building more efficient than commercial code, including information on COH energy efficiency incentives
- Incentives for building better than energy code
- 5,895 Mcf saved for 27 projects

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- Sarah reviewed the SCC program and its focus on incentives, training, and education for trade allies and customers to build commercial buildings better than Ohio's commercial building energy code.

- Jack reviewed the marketing for the programs and mentioned that we had at least quadrupled the number of impressions over last year's marketing campaign. This is important to create awareness with customers.
- "Saving Matters" is the name of the energy efficiency awareness campaign; each individual program also has its own marketing approach specific to the program design and target market.

## EE Marketing – 2017 Highlights

- Customers purchased more smart thermostats through the e-store in 2017 than the total quantity of thermostats sold from 2014 – 2016
- Increased traffic to the SES e-store by 1,340% YoY
- Increased traffic to the WarmChoice web page by 114% YoY
- Built new capability for EfficiencyCrafted Homes via Find Your Builder
- Achieved 129% of the Home Energy Efficiency Checkup customer participation target

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- Jack reviewed some of the marketing highlights. The USEPA Energy Star brand (most recognized brand by customers) brought additional value to customers.

## EE Marketing - 2018

- Continue to deploy tactics that were successful in 2017
- Continue to build EE Program awareness through consistency in all marketing materials
- Test new strategies to continue to increase customer participation
  - Targeting ads to customers listening to music on their connected device
  - Pop-up events
  - Email nurture campaign
  - Behavioral/participation targeting
  - Video: TV/Cable & online

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- Jack reviewed some of the marketing components for 2018. A key focus is to create EE program awareness in communities.
- In addition, a nurture campaign to nudge customers who have had an energy audit but did not complete all of the energy efficiency upgrades is planned.

## 2017 DSM Program Awards/Recognition

- 2018 ENERGY STAR Sustained Excellence in Program Delivery, Partner of the Year (for 2017)
  - EfficiencyCrafted Homes
  - Appliance Rebates
  - Simple Energy Solutions
  - Home Energy Audits/Rebates

- 2017 USEPA ENERGY STAR Homes Market Leader
- 2017 COAD Weatherization Champion – Adrian Andrews
- Marcom Platinum award in the Video/Audio | Television (Broadcast & Cable) promotion Category
- Finalist for Best in Data Insight – PRWEEK Awards
- Finalist for marketing impacts – SABRE Awards

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- Jack reviewed some of the program awards and recognition. COH received a 5 Year Sustained Excellence award from USEPA for its continued success with its program portfolio.

## Thank you!

- www.ColumbiaGasOhio.com/SavingMatters
- Jack Laverty, Manager, Energy Efficiency
  - jlaverty@nisource.com
  - 614-460-4714
- Have a safe day!

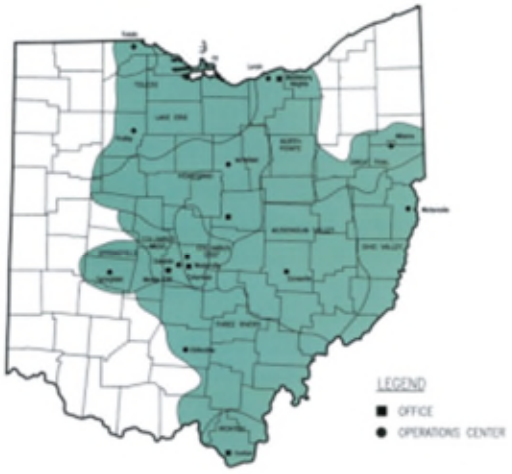
## Appendices

- Overview of Columbia Gas of Ohio
- Multiple Benefits of DSM/Energy Efficiency
- WarmChoice Historic Exemplary Performance

## Overview of Columbia Gas of Ohio (COH)

Largest LDC in Ohio

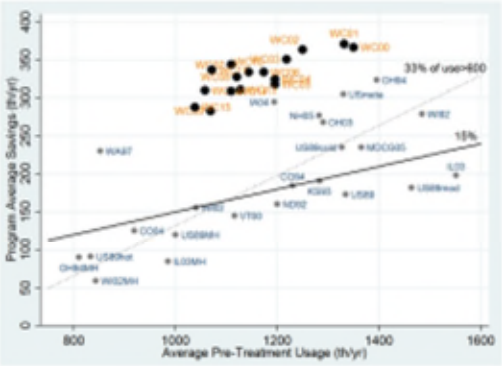
- 61 of 88 Counties
- +1,000 Communities Served
- ~19,900 Miles of Distribution Main
- ~1.4 Million Customers
- ~1,300 Employees



## Multiple Benefits of DSM/EE

- Safety
- Health & well-being
- Employment
- Poverty alleviation
- Disposable income
- Building durability
- Energy savings
- GHG emissions reduced
- Homelessness prevention
- Energy security
- Energy delivery
- Energy prices
- Macroeconomic impacts
- Local air pollution
- Resource management
- Public budgets
- Asset values
- Resiliency/future proofing

## WarmChoice® Historic Exemplary Performance




- Comparison to other low-income weatherization programs
- Average Cost Per Home
  - HWAP - $10,000+
  - WarmChoice - $6,099

# Columbia Gas of Ohio DSM Stakeholder Group
# Meeting 1
# 290 W Nationwide Blvd
# 1-290-C
# June 28, 2019
# 10:00 am

## Meeting Minutes

## Stakeholders Participating

Adrian Andrews (COH)
Marilyn Bussard (COH)
Dave Davenport (GLS)
Ed Frantz (COH)
Steve Garnack (MORPC)
Randy Hall (Cornerstone Energy)
Chris Healey (OCC)
John Johnson, Jr. (GLS)
Kris Klaus (OHBA)
John Laverty (COH)
Erv McKinney (COH)
Andrew Metz (COH)
Nicole Peoples (COAD)
Sarah Poe (COH)
Chris Rausch (COH)
Ron Rees (COAD)
Richard Ricks (COH)
Brennan Riggs (PUCO)
Jim Ripke (PUCO)
Jeff Scott (Fahlgren Mortine)
Tonja Stewart (PUCO) via phone
Ryan Stredney (COH)
Hartley Sutor (Fahlgren Mortine)
Mark Swepston (Atlas Butler)
Dora Tharp (OPAE)
Melissa Thompson (COH)
Larry Titus (COH)
Matt Vorndran (CLEAResult)

# COH DSM Stakeholder Group Meeting

Columbus, Ohio
June 28, 2019

Columbia Gas of Ohio
A NiSource Company

## Agenda

- Safety Moment
- Welcome and Introductions
  - Introductions
  - Opening remarks
    - Melissa Thompson, Director, Regulatory Policy
    - Jack Laverty, Manager, Energy Efficiency
- 2018 DSM Program Results and 2019 Initiatives
- Regulatory Compliance Matters
- Adjournment

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- Jack Laverty welcomed attendees to the DSM Stakeholder Group meeting and reviewed the agenda.

## Safety Moment – Smoke and Carbon Monoxide Alarms

### Smoke Alarms

- Most smoke alarms should be replaced every 10 years
- 10-year battery – even if hard wired
- Install on every level of home
- Test monthly, change batteries when time changes
- Consider a dual function for smoke and CO

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- Jack introduced Ervin McKinney and Larry Titus to lead the safety moment.
- Larry initiated the discussion, noting the importance of installing smoke alarms according to manufacturer instructions and key replacement timeframes.

## Safety Moment – Smoke and Carbon Monoxide Alarms

### Carbon Monoxide

- Smokers, pregnant women, elderly, children and people with anemia/heart or lung conditions are more prone to the effects of Carbon Monoxide poisoning.

### Consider when purchasing a CO alarm

- Purchase alarms with sealed batteries so they cannot be removed
- Alarms with electrochemical sensors are more stable during humidity/temperature changes/resist reacting to common household chemicals.
- End-of-life warning
- UL or CSA listed
- Plug-in with battery backup for protection during short-term power outages
- Digital display screen shows level of CO detected/updates every 15 seconds
- Peak-Level memory records the highest level of CO present
- Voice Warning announces the threat present /includes traditional alarm beep

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- Erv reviewed major considerations when purchasing CO alarms.
- Jack concluded that Safety First is the mantra of our company.

## Meet the COH EE Team

| Name | Title | Email |
|---|---|---|
| Sarah Poe | Manager of Energy Efficiency Programs | spoe@nisource.com |
| Adrian Andrews | WarmChoice Program Manager | aandrews@nisource.com |
| Larry Titus | Quality Assurance Representative | ltitus@nisource.com |
| Erv McKinney | Quality Assurance Representative | emckinn@nisource.com |
| Chris Rausch | Existing Buildings Program Manager | crausch@nisource.com |
| Ryan Stredney | New Buildings Program Manager | rstredney@nisource.com |
| Andrew Metz | Financial & Analytics Lead | ametz@nisource.com |
| Marilyn Bussard | Administrative Assistant | mbussard@nisource.com |
| Jack Laverty | Manager, Energy Efficiency | jlaverty@nisource.com |

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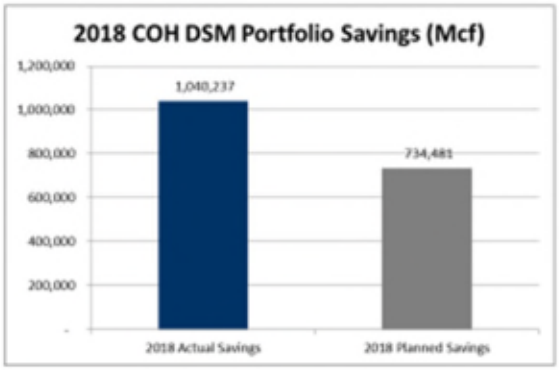
- Jack introduced the Energy Efficiency (EE) team.
- Jack also mentioned other EE partners in attendance: Matt Vorndran (CLEAResult) and Jeff Scott and Hartley Suter (Fahlgren Mortine).
- Hartley Suter gave a brief account of Fahlgren's involvement with the EE program over past couple of years.
- Melissa Thompson welcomed attendees, highlighting savings to customers of 10 million Mcf of gas and programs should be able to reduce greenhouse emissions by 60,000 tons of carbon dioxide. She also emphasized that safety is key for Columbia Gas. Melissa also noted how digital marketing is used to reach customers with help of Fahlgren.

## 2018 DSM Program – Metrics and Highlights

- Exceeded planned natural gas savings target
  - Mcf savings, lifetime: 10,152,794
  - Reduced tons $CO_2$, lifetime: 60,917
  - Customers served: 568,718






- Jack reviewed high level metrics for the 2018 program.

## 2018 DSM Program – Metrics and Highlights

- Health and Safety (H&S) Statistics

| H&S Category | # Homes |
|---|---|
| Asbestos | 527 |
| Combustion Safety | 646 |
| Cracked Heat Exchanger | 647 |
| Gas Leaks | 180 |
| Mold & Moisture | 1,766 |
| Venting Issues | 1,583 |
| Wiring Issues | 643 |



- Jack reiterated that safety is our first priority – homes are not weatherized until safety issues are fixed.
- WarmChoice® customer health and safety issues are mitigated through the weatherization process; customers receiving rebates from the Home Energy Audit/Rebate program are required to mitigate health and safety issues before moving forward with weatherization.

## WarmChoice® – Highlights

Program Manager: Adrian Andrews

- LI Customer whole house weatherization program
- One stop shop for leveraging EE, housing, and social services
- Qualified as a Home Performance with ENERGY STAR® program
- Recognized as Exemplary Energy Efficiency Program, Low-Income: Natural Gas Utility in ACEEE's Fourth National Review

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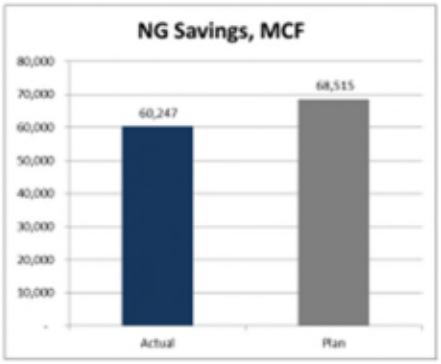
- Adrian Andrews presented the WarmChoice program, preferring to refer to it as an income qualifying program rather than a low income program.
- Providers can refer customers to social service partners when they see other customer needs.
- WarmChoice was qualified this year as a Home Performance with ENERGY STAR program.
- The program received ACEEE exemplary program recognition for the third time; this time because of the amount of collaboration the program does to reach underserved customers in difficult to reach areas.

## WarmChoice® – Metrics

- NG Savings Target: 96% of Customers Served and 88% of Savings




HOME PERFORMANCE WITH ENERGY STAR

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- Adrian reviewed the WarmChoice metrics.

## WarmChoice® - Program Impact

**WarmChoice®**

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- Adrian played a video of a customer in Coshocton expressing her appreciation of the program.

## WarmChoice® – Health and Safety

Program Manager: Adrian Andrews

- Health and Safety Inspections detected and repaired in 2018:
  - 108 interior gas leaks
  - 647 cracked heat exchangers
  - 1,583 venting issues
- Leveraged Health and Safety Funding Sources
  - HWAP E – furnace, water heater, wiring and roof repair/replace
  - Area Office on Aging
  - Senior Programs
  - USDA Rural Housing/Housing Trust Fund
- Other potential funding sources for non-energy efficiency health and safety?

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- Adrian reviewed health and safety benefits of WarmChoice noting that providers do a great job of looking for, and partnering with, other resources to make the money go as far as it can to service as many customers as we can.
- Adrian asked whether meeting participants had other funding source suggestions or recommendations for non-energy efficiency health and safety items. No suggestions or recommendations were forthcoming.

## WarmChoice® and Energy Assistance

- Coordinating with Columbia's Energy Assistance Team
  - Cross promotion of Energy Assistance and WarmChoice
    - Marketing materials
    - COH website
    - Emails
    - Referrals
- Collaborating on Customer Concerns
  - High bills/Payment plans
  - Appliance concerns
  - Comfort issues

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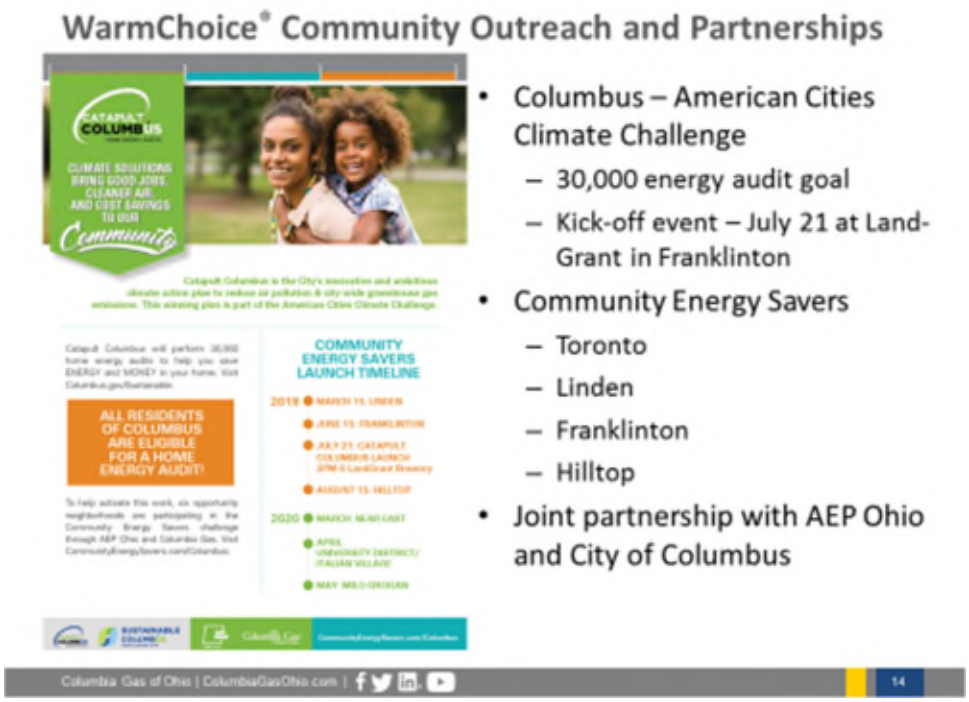
- Adrian noted how closely the WarmChoice program works with Energy Assistance.

## WarmChoice® - Program Impact/Collaboration

- Virginia, 91 years old
  - HEAP and PIPP participant
  - Interior Gas Line Emergency
  - Columbia Gas Service Tech Contacts WC
  - HWAP/WarmChoice Applicant – LEADS
  - High Gas Use – 1538 Ccf
  - Cost share with HWAP - New furnace, gas lines
  - HWAP E - New roof to allow weatherization



- Adrian shared a customer story that resulted from the collaboration of several COH departments to assist the customer.




- Sarah Poe presented on various community outreach and partnerships including the American Cities Climate Challenge (ACCC) with the city of Columbus and AEP Ohio. Columbus is one of 25 cities participating in ACCC.
- She also discussed targeted neighborhoods being served in conjunction with AEP Ohio through a partnership with their Community Energy Savers program.

## WarmChoice® – 2018 Outreach

- Promoting the program and Energy Assistance where our customers seek assistance
  - Community Action Agencies
  - Jobs and Family Services/HEAP Offices
  - Mid-Ohio Food Bank
  - St Stephen's Community House
  - Local Matters - Franklin County and Delaware County
  - The Breathing Association
  - Ohio Healthy Homes Network
  - Food Pantries

- Marketing toolkits to Providers to promote locally

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- Adrian discussed some of the many partnerships promoting the WarmChoice program.

## WarmChoice® – 2018 Marketing Outreach

- Deployed a hyper-local program targeting low-income customers
  - Localized distribution of more than 80K cash jackets in check-cash locations across the footprint
  - Went beyond the ZIP code; targeted distribution of more than 23K door hangers by street/block
  - Secured more than 1.1 million paid social impressions through heavy ups targeted to low-income customers
- Paid search was an "always-on" tactic
- Bill inserts delivered the message to every customer

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- Hartley Suter discussed WarmChoice marketing tactics used to reach potentially eligible customers.

## Simple Energy Solutions – Highlights

Program Manager: Chris Rausch

- Energy Efficiency Upgrades
  - EE Showerheads
  - EE Aerators
  - Smart and Programmable Thermostats
- Coordinated marketing efforts with Google Nest and ecobee smart thermostat rebate specials drive participation
- Far exceeded smart thermostat goal
- Web links between AEP and Columbia
- Web link on ENERGY STAR® smart thermostat website as a utility partner

ENERGY STAR

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- Sarah Poe presented highlights for the Simple Energy Solutions program noting that working directly with manufacturers helped to exceed the smart thermostat goal.

- Sarah highlighted the various delivery methods of the SES program.

## Simple Energy Solutions – Metrics

- 120% of customers; 191% of NG Savings Target

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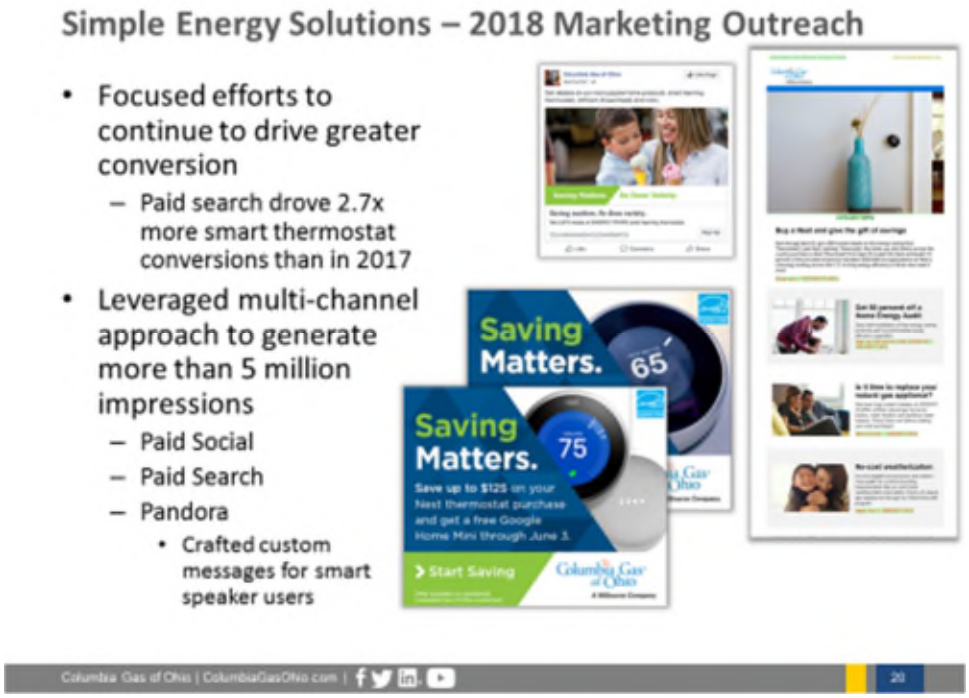
- Sarah reviewed program metrics noting that both customer participation and natural gas savings far exceeded targets.




- Hartley Suter discussed SES marketing tactics, noting that its success was due to partnerships and timely access to data and analytics.
- One key tactic was utilizing Pandora is the largest radio station across our service territory.

## Appliance Rebates – Highlights

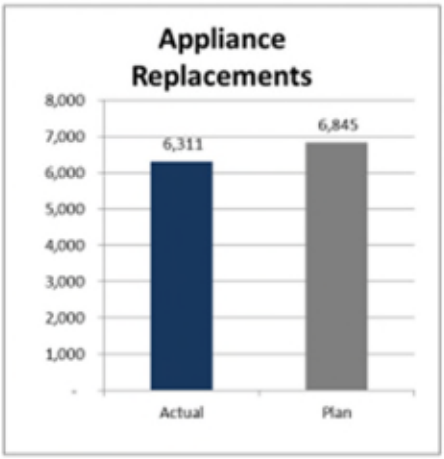
Program Manager: Chris Rausch

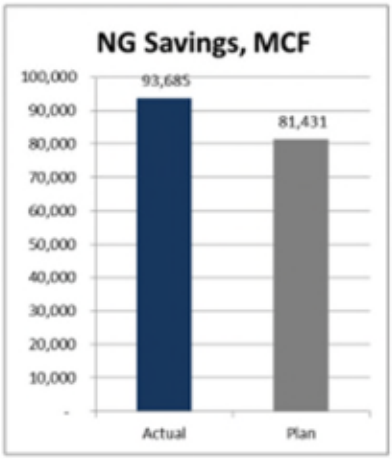
- 187 participating contractors; training and program requirements
- $300 instant discounts on furnaces with AFUE ≥ 96%; $350 instant discounts on boilers with AFUE ≥ 90%
- $50 instant discounts on water heaters with an EF ≥ .67; $100 instant discounts on tankless water heaters with an EF ≥ .91

- Sarah reviewed the rebates for the Appliance Rebates Program.

## Appliance Rebates – Metrics

- 92% of Customers; 115% of NG Savings Target

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- Sarah Poe indicated that slightly fewer than planned customers participated in the program, but that the program exceeded its natural gas savings target.

## Home Energy Audit and Rebates – Highlights

- Diagnostic, computerized home energy audits
- Rebates on Energy Efficiency Upgrades:
  - Attic and Wall insulation
  - Air/duct leakage sealing
  - Upgrade available from programmable to smart thermostat
  - Identified 3,396 health and safety issues in customers' homes
    - Detected 72 interior gas leaks
    - 646 combustion safety issues
    - 1,766 Mold and Moisture issues
- Net Promoter Score: 8.98/10
- Partnership with Ohio Interfaith Power & Light

Program Manager: Chris Rausch

**Home Energy Audit**

Sign up for our home energy audit to receive a comprehensive evaluation of your home's energy efficiency, along with recommendations for upgrades and generous discounts on energy efficiency improvements.

Get an Audit

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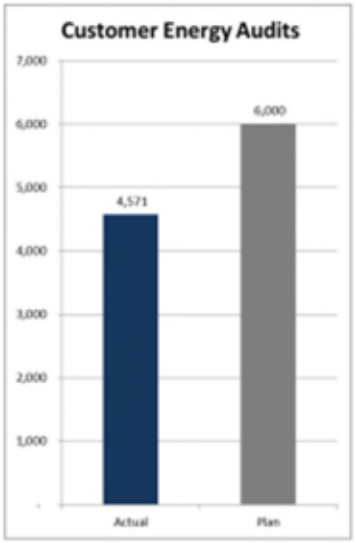
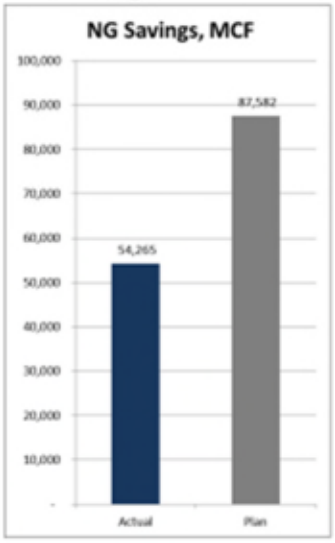
- Sarah reviewed highlights of the Home Energy Audit and Rebates (HEAR) program.
- The program is for customers above the income guidelines for WarmChoice.
- We recently added a smart thermostat component to program that customers can upgrade to from a programmable with an additional cost.
- A partnership with Ohio Interfaith Power & Light promotes Home Energy Audits to houses of worship.

## Home Energy Audit and Rebates – Highlights

- 76% of Customer Target; 62% of savings

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- Sarah discussed the program metrics.

## Home Energy Audit and Rebates – Customer Impacts

- "The new thermostat is awesome. It already feels warmer in the living room and "dining" room. I had it set at the same 70 degrees. … I look forward to getting this insulation project completed and to working on the other projects you recommended" – Kathleen F.
- "The confidence in my increased efficiency and knowing that I am helping the environment and my energy bill has resulted in me recommending program to several people already." – Teresa C.
- "Excellent follow through on all aspects of the program, money saving and energy savings that starts right away." – Leon & Barbara R.
- "I think the program met the needs and concerns that were expressed. Very well done thank you! I appreciate Columbia Gas efforts!" – Kathy H.

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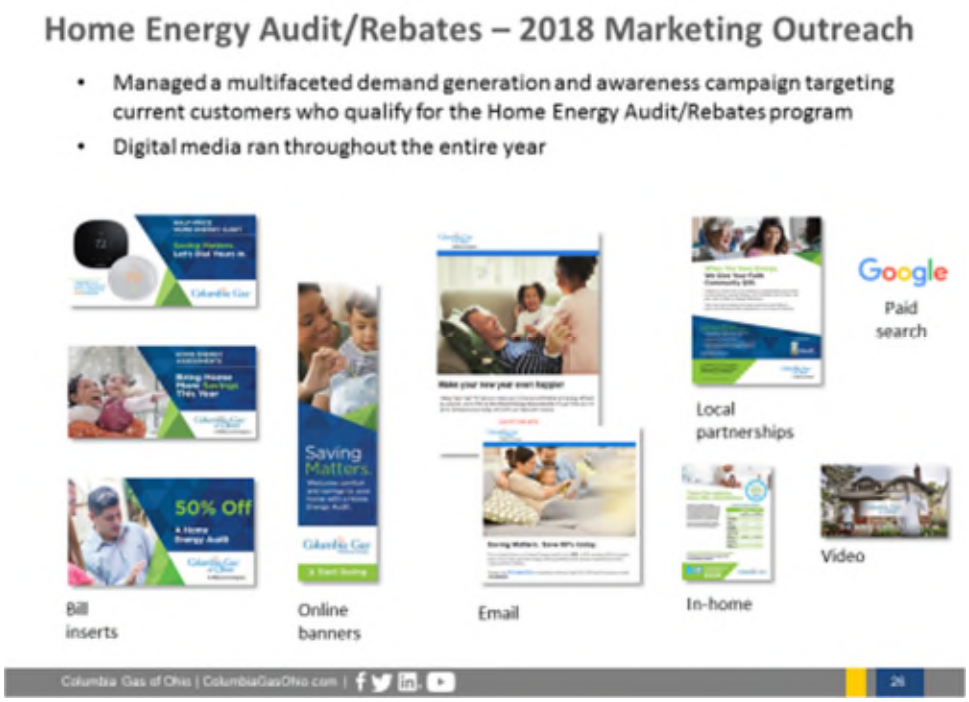
- Sarah presented some quotes from customers noting a focus on measuring customer satisfaction to ensure an excellent customer experience.




- Jeff Scott presented on the marketing tactics for the HEAR program which included the use of online banners.

## Home Energy Audit/Rebates – 2018 Marketing Outreach

**Google AdWords**

- Delivered 285,543 Impressions
- Annual average click thru rate of 19.98%
- Category Benchmark: 2% to 7%

**Google Display Network**

- Delivered 13,004,376 Impressions
- Annual average click thru rate of .25%
- Category Benchmark: .05 to .15

**YouTube**

- Delivered 1,559,198 Impressions
- Video played to completion 34.58% of the time
- Category Benchmark: 27%-30% view to completion

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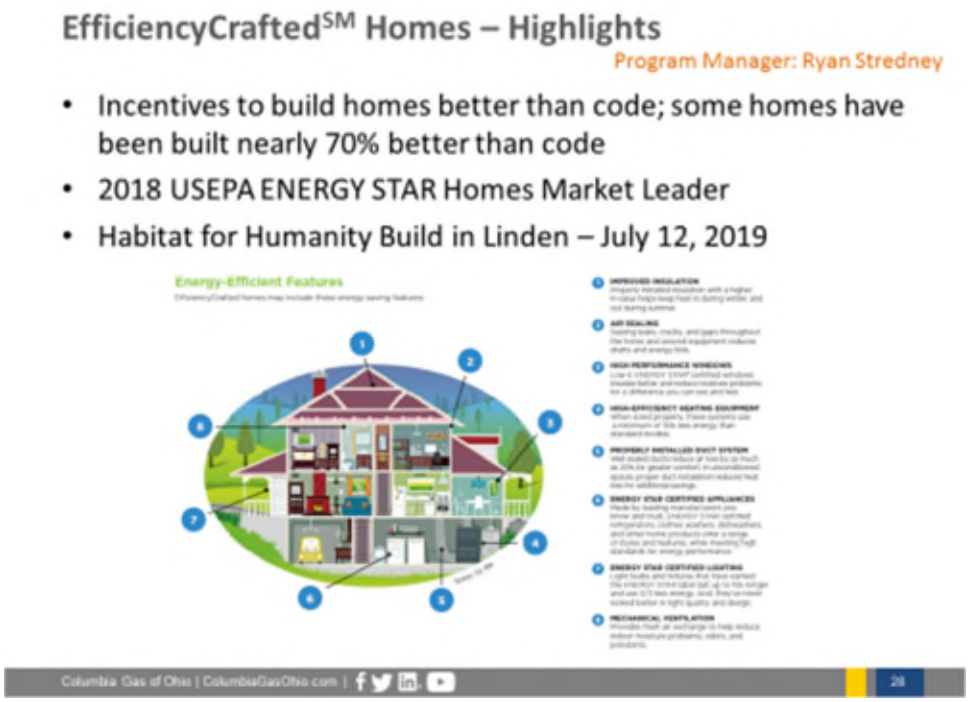
- Jeff discussed metrics related to HEA/R marketing tactics.

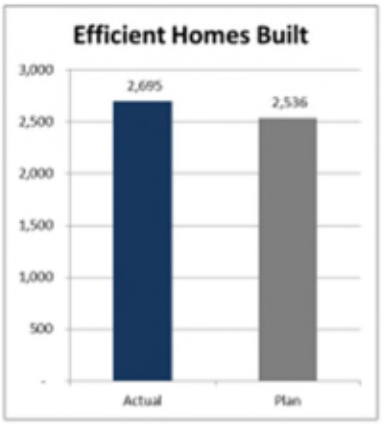



- Ryan Stredney discussed highlights for the EfficiencyCrafted Homes program.

- Ryan shared a customer testimonial video for the ECH program.

## EfficiencyCrafted℠ Homes – Metrics

- 106% of Homes Built; 115% of NG Savings Target
  - 435 ENERGY STAR certified homes



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- Ryan reviewed program metrics and noted that out of over 2,600 new homes built through the program, 435 were ENERGY STAR certified.

## EfficiencyCrafted Homes – 2018 Marketing Outreach

- Reached the customer and generated more than 4.4 million impressions through
  - NPR
  - Search Retargeting
  - Paid Social
  - Paid Search
- Drove greater engagement than 2017
  - Increased site traffic by 22%
  - Drove 3% more clicks to builder sites

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- Hartley Suter discussed the marketing tactics for ECH.

## $e^3$ smart – Highlights

Program Manager: Ryan Stredney

- Energy education curriculum delivered to students in 4-12 grade classes; separated curriculums into two levels
- Partnership with AEP in jointly served counties; stand alone program elsewhere
- 314 teachers within 210 schools in 132 school districts participated.
- 21,075 students were educated and received EE kits
  - Increasing kit goal in 2019/2020 school year
- 55% of teachers participating in program work in schools with 50% or greater free/reduced lunch programs
- Celebrated 25 years partnering with Ohio Energy Project

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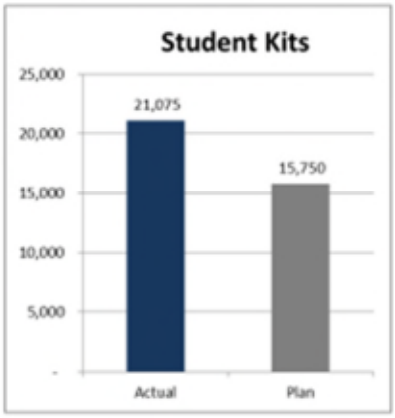
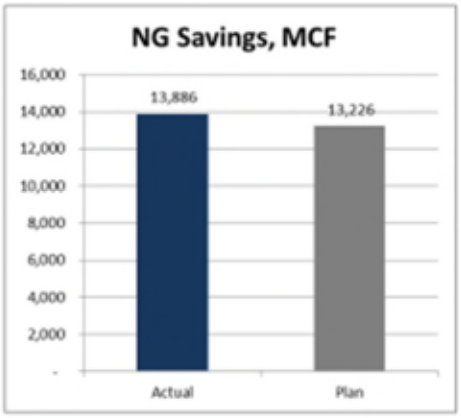
- Ryan reviewed the $e^3$ smart program highlights and noted that we worked to include as many schools and students as possible in our stand-alone territory as well as partnering with AEP Ohio in overlapping service territories.

## $e^3$ smart – Metrics

- 133.8% of Students; 105% of NG Savings Target






- Ryan reviewed the $e^3$ smart program metrics.

## Home Energy Efficiency Reports – Highlights

Program Manager: Ryan Stredney

- Compare customers' home energy use to similar homes; comparison motivates customers to take action
- High customer acceptance
  - Low opt out rate
  - Low dissatisfaction due to up front communications and strategic report design modifications
- Customer segmentation
  - Target/segment customers with appropriate energy efficiency program messages based on their:
    - annual usage,
    - income level, and
    - past COH EE program participation
- Moving to a new contractor, Bidgely, to implement the program through 2022

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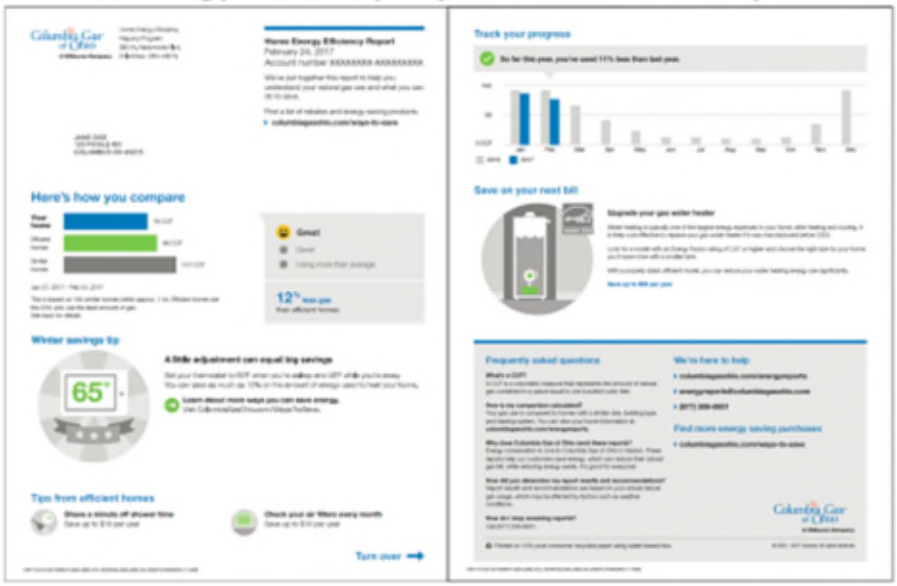
- Ryan reviewed the Home Energy Efficiency Reports (HEER) program highlights focusing on customer segmentation to promote messages appropriate to customers.
- Ryan noted a recent change in the HEER program contractor from Oracle to Bidgely. Chris Healy of the OCCC asked about the change in implementers. Ryan stated that the contract was up and that we had put the program out for bid through an RFP process. The process included face-to-face interviews with potential contractors. Bidgely was selected as a result of the process.

## Home Energy Efficiency Reports – Customer Impacts

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- Ryan reviewed a copy of a home energy efficiency report and explained the different report segments.

## Home Energy Efficiency Reports – Customer Impacts

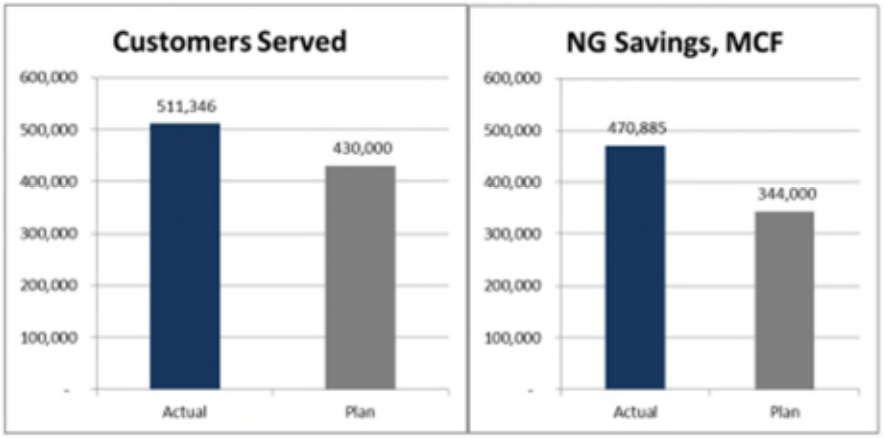
*"I was fortunate to benefit from your WarmChoice® program about a year and a half ago. I just thought you might be as pleased as I am with this report from Columbia Gas indicating that my house is now consuming gas at a rate of 35% less than other houses that are considered "efficient." Thank you so much for what you do!" - Customer who learned about WarmChoice through Home Energy Efficiency Report*



- Ryan discussed a customer who learned about, and participated in the WarmChoice program as a result of receiving the report.

## Home Energy Efficiency Reports – Metrics

- 119% of Customers; 137% of Savings Target






- Ryan reviewed the HEER program metrics.

## Home Energy Efficiency Checkup – Highlights

Program Manager: Chris Rausch

- Online, user friendly energy audit
- Additional EE on-ramp for customers
- Customized tips and recommendations for Columbia's EE programs
- 6,987 online energy audits
- 140% of customer participation target
- ColumbiaGasOhio.com/checkup

**Online Home Energy Checkup**

Take our fast, easy online survey to learn about the energy efficiency of your home. Once the survey is completed, you'll receive customized advice on how to begin saving energy right away.

Start Saving Now

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- Sarah Poe reviewed the Home Energy Efficiency Checkup (HEEC) on-line energy audit process for customers to enter information on their home (which takes about 5 minutes) resulting in recommendations for ways to save energy in their home.
- Information from the audit is used by Columbia to help refer customers to our energy efficiency programs for next steps through a direct web page link to that program.
- This program is partnering with the city of Columbus' American Cities Climate Challenge.

## Innovative Energy Solutions – Highlights

Program Manager: Chris Rausch

- Eligible Customers
  - Non-Profits
  - Houses of Worship
    - Partnership with OhIPL
  - Public buildings and Schools
  - Businesses/Farms
    - Partnership with City of Columbus Health Department
- EE Upgrade Options
  - Energy Audits
  - Custom Rebates
  - Prescriptive Rebates

**Existing Facility Improvements**

Get rebates for energy audits and facility improvements on existing buildings that will help reduce your monthly natural gas bills.

Learn More

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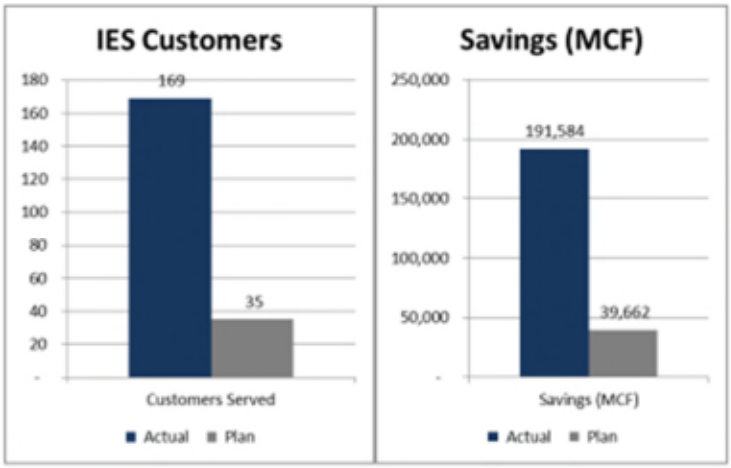
- Sarah discussed the energy efficiency options available to eligible customers through the Innovative Energy Solutions (IES) program, highlighting two partnerships with Ohio Interfaith Power & Light and the City of Columbus Health Department.

## Innovative Energy Solutions – Metrics

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- Sarah reviewed the program metrics noting that the program exceeded targets.

## Small Commercial Construction – Highlights

- Two training programs held:
  - "Optimizing Building Performance through Early Energy Analysis"
  - "Pathway to Zero Energy Building"
  - Trainings also included information on COH energy efficiency incentives
- Incentives for building better than commercial building energy code
- 9,753 Mcf saved for 25 projects; achieved 100% of customer participation goal

Program Manager: Ryan Stredney

**Small Commercial Construction**

Take advantage of rebates that will help lower your monthly natural gas bills by building energy efficiency into your space.

Learn More

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- Ryan reviewed the Small Commercial Construction (SCC) program for new commercial buildings to be built better than Ohio's commercial building energy code.

## EPA Portfolio Manager Automated Benchmarking – Highlights

Program Manager: Ryan Stredney

- Launched a platform to provide an automated flow of natural gas data to the EPA's ENERGY STAR Portfolio Manager tool.
- 2018 (Nov and Dec) 1 customer enrolled
- Worked in conjunction with AEP:
  - Co-brand landing site
  - Email blast to participating customers
  - State wide press release

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- Ryan reviewed the EPA Portfolio Manager program which launched in November of 2018.
- One customer enrolled in 2018

## EE Marketing – Broader Awareness

- Leveraged power of the collective program portfolio with individual programs
- Continued to evolve program messaging, leading with customer benefits, and streamlined the customer experience
- Created first TV spot
- Earned more than 80 million impressions through online video, audio, print, outdoor, paid search, paid social and TV/Cable

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- Hartley reviewed marketing efforts to promote overall awareness of Columbia's energy efficiency programs.
- A variety of marketing tactics and messages were used in order to reach the diversity in customers and their geographical distribution in Ohio.
- The key focus of the campaign was on the value of energy efficiency to the customer and the potential energy savings.

## EE Marketing – Broader Awareness

- Positioned video as lead tactic and leveraged across channels
- 7.1 million impressions across TV (linear, CTV, TVE, OTT, Set Top), paid social, podcasts, Hulu, Pandora and paid search

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- Hartley highlighted a 30 second TV spot containing four running story lines to reach different customers.

## 2019 DSM Portfolio and Marketing Awards

- 2019 ENERGY STAR Sustained Excellence in Program Delivery, Partner of the Year (for 2018)
  - EfficiencyCrafted Homes
  - Appliance Rebates
  - Simple Energy Solutions
  - Home Energy Audits/Rebates

- 2019 PRWeek Honorable Mention for Best in Data Insight
- 2019 Bronze Anvil Winner for Best Use of Data/Analytics
- 2019 North American SABRE Finalist for Energy and Natural Resources (Diamond SABRE winner in 2018)
- Two 2019 Silver Telly Awards (Public Awareness and B2C categories) for Saving Matters TV Spot

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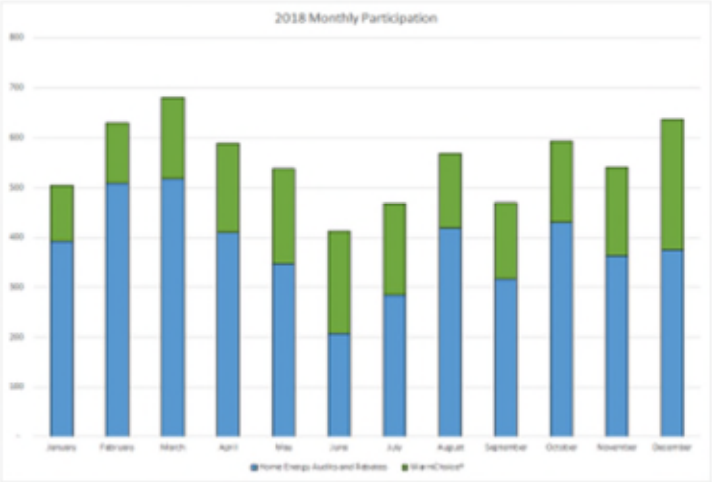
- Hartley reviewed the listing of marketing awards noting that this was the eighth year for an ENERGY STAR award.

## 2019 DSM Portfolio Update

- Customer participation rates are typically not linear






- Andrew Metz reviewed the participation numbers for the retrofit programs noting the natural fluctuation in customer participation every month due to weather and other reasons.

## 2019 DSM Portfolio Update

| Program | 2019 Customers Served Target | 2019 Customers Served (Thru May) | 2019 Percent of Annual Customers Served Achieved (Thru May) |
|---|---|---|---|
| Home Energy Audits and Rebates | 6,000 | 2,068 | 34% |
| WarmChoice | 2,150 | 693 | 32% |
| Appliance Rebates | 6,845 | 3,206 | 47% |
| EfficiencyCrafted Homes | 2,729 | 1,526 | 56% |
| Home Energy Efficiency Reports | 430,000 | N/A | N/A |
| Simple Energy Solutions | 11,267 | 4,029 | 36% |
| $e^3$ smart | 15,750 | N/A | N/A |
| On Line Audit | 5,000 | 4,097 | 82% |
| Innovative Energy Solutions | 35 | 30 | 86% |
| Small Commercial Construction | 25 | 7 | 28% |
| EPA Portfolio Manager Automated Benchmarking | 25 | 24 | 96% |

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- Andrew reviewed the number of customers served targets along with numbers served to date in 2019.

## 2019 DSM Portfolio Update

- 2019 Year-to-Date Energy Efficiency Program Participation, as of May 2019 (42% of year complete)

| Program | 2017 Percent of Annual Customers Served Achieved (Thru May) | 2018 Percent of Annual Customers Served Achieved (Thru May) | 2019 Percent of Annual Customers Served Achieved (Thru May) |
|---|---|---|---|
| Home Energy Audits and Rebates | 26% | 36% | 34% |
| WarmChoice | 30% | 35% | 32% |
| Appliance Rebates | 32% | 36% | 47% |
| EfficiencyCrafted Homes | 12% | 43% | 56% |
| Home Energy Efficiency Reports | N/A | N/A | N/A |
| Simple Energy Solutions | 17% | 51% | 36% |
| $e^3$ smart | N/A | N/A | N/A |
| On Line Audit | 14% | 16% | 82% |
| Innovative Energy Solutions | 14% | 77% | 86% |
| Small Commercial Construction | 16% | 60% | 28% |
| EPA Portfolio Manager Automated Benchmarking | N/A | N/A | 96% |

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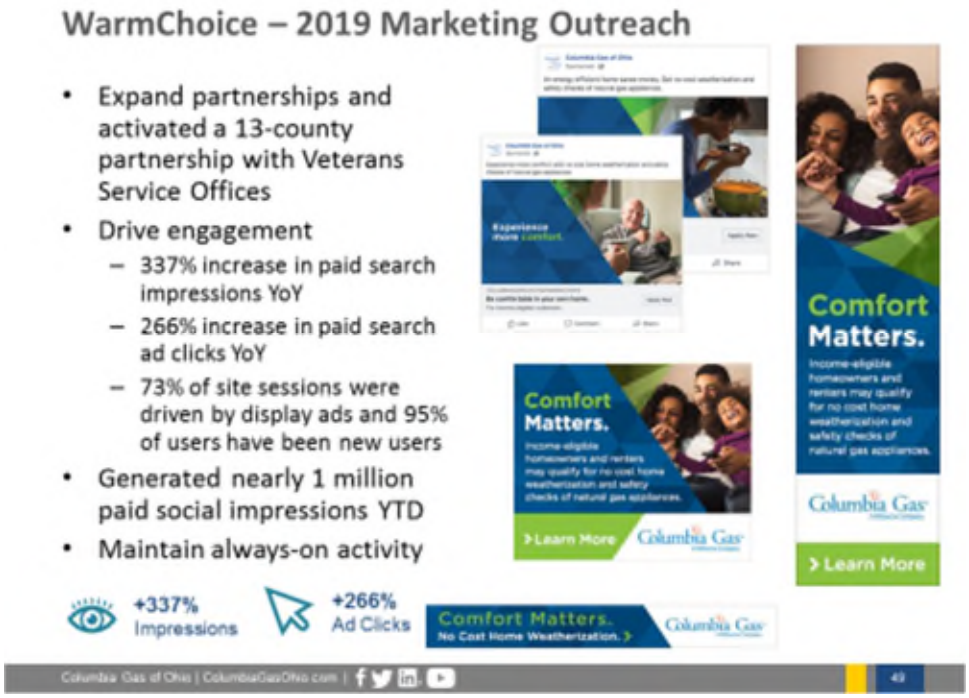
- Andrew reviewed programs comparing to 2017 and 2018 historic participation rates to current participation through May of each year.




- Hartley reviewed 2019 WarmChoice marketing outreach tactics, including outreach to veterans.

## Simple Energy Solutions – 2019 Marketing Outreach

- Continued multi-channel approach for maximum impact
  - Paid Search
    - 93% increase in paid search conversions, YoY through May
    - 47% decrease in cost-per-click
  - Native/Display
  - Paid Social
  - Nearly 700K impressions generated across channels, YTD
- Deeper targeting to smart speaker users and podcast listeners
  - Pandora Connected Home
  - NPR Podcasts

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- Hartley reviewed 2019 marketing outreach tactics for SES.

## EfficiencyCrafted Homes – 2019 Marketing Outreach

- Continued multi-channel approach; added additional mediums to generate nearly 2 million impressions, YTD
  - Explore the power of Pinterest
    - 0.40% CTR (above benchmark)
  - Host first-ever ECH sweepstakes
- Drove greater efficiency YoY
  - 134% increase in conversions
  - 335% decrease in CPC

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- Hartley reviewed marketing tactics for ECH indicating that we appear to be the first utility to market on Pinterest.

## Home Energy Audit/Rebates – 2019 Marketing Outreach

- Developed a robust schedule of nurturing email and direct mail components in order to enhance recall and maintain top-of-mind awareness with our customers
- Thus far in 2019:
  - 7.3% increase in major measure conversions
  - 54% increase in paid search impressions YoY
  - YouTube viewing to completion up to 43.32%
  - Launched a summer radio campaign consisting of 3,400,000 impressions targeting those customers identified in the segmentation research study within Columbus Metro
- Maintaining a continuous marketing presence with multiple touch points while taking a "test and learn" approach to *messaging* and *tactics*

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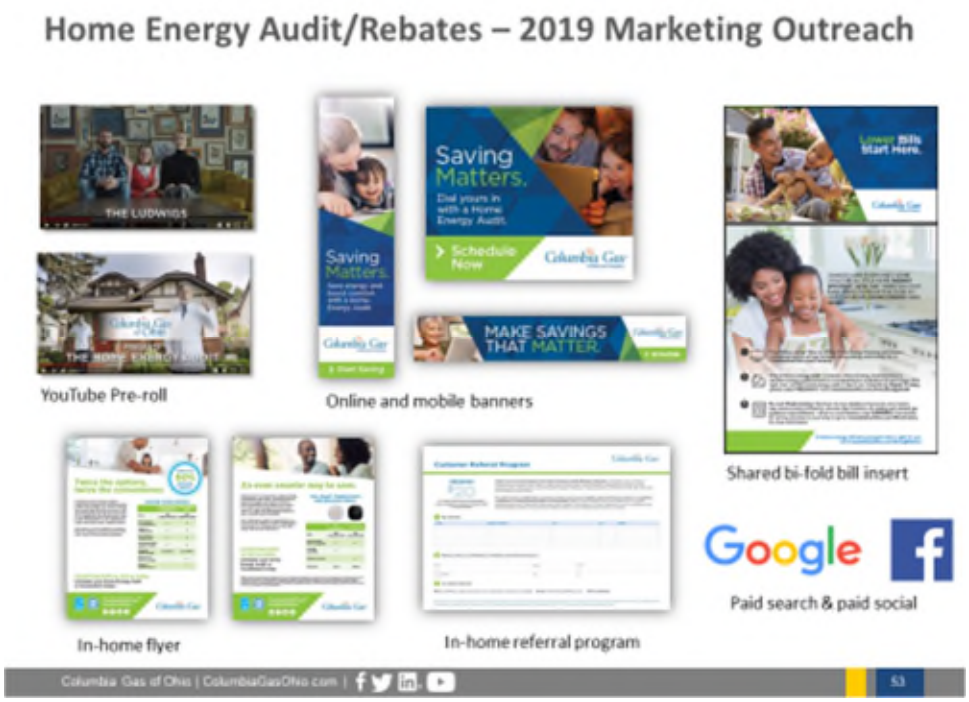
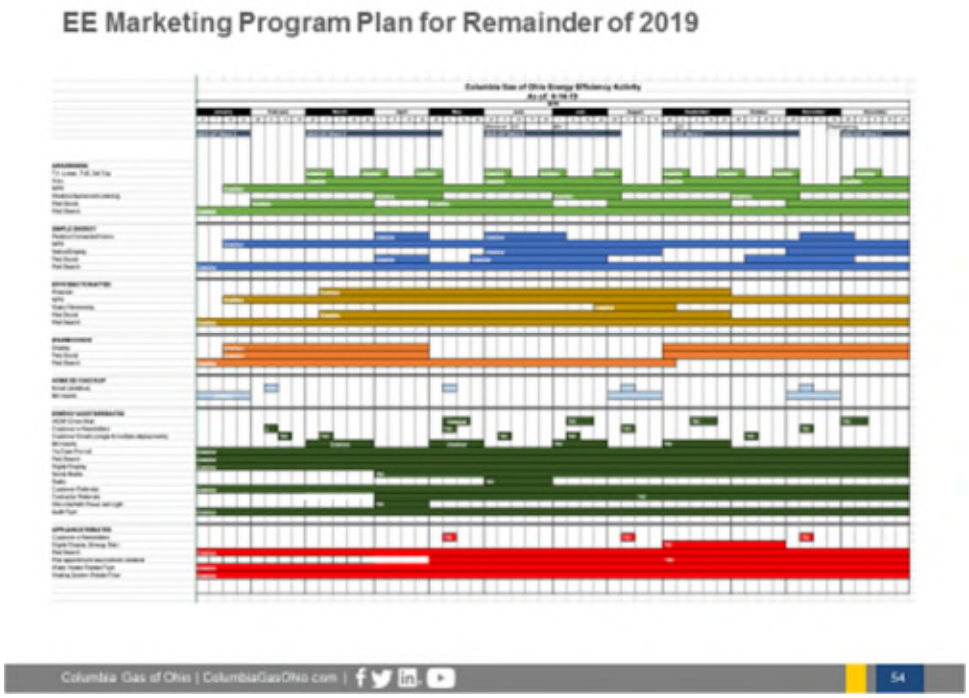
- Jeff Scott reviewed marketing tactics for HEA/R indicating more emphasis in 2019 on e-mail messaging and an increase in radio spots.




- Jeff reviewed the mix of marketing tactics for HEA/R.




- Jeff reviewed a snapshot of all marketing strategies currently underway for the various programs, noting that that our base marketing strategy is to assume that no two customers are alike.

## Regulatory Compliance Matters

- On April 10, 2019, the Commission issued a Second Entry on Rehearing in Columbia's DSM Extension proceeding
- In that Entry, Columbia was ordered to work with AEP, FirstEnergy, CRES and CRNG suppliers that serve any portion of Columbia's service area to develop a consolidated smart thermostat program
- Columbia held its first meeting of this working group on June 19, 2019
- Columbia will be launching its survey to gather programmatic information from these parties next week
- Columbia anticipates a series of meetings to discuss the details and work to launch a consolidated smart thermostat rebate process
- The next meeting will be held on Wednesday, July 31 at 10:00 am in hearing Room 11-C

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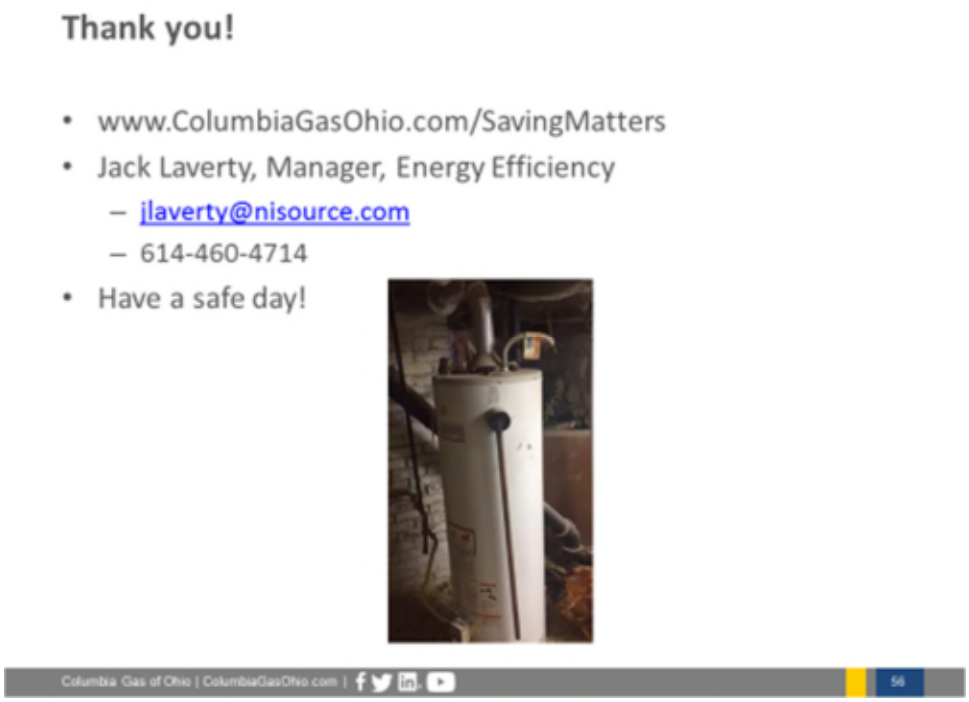
- Melissa Thompson reviewed regulatory requirements that came out after the last extension case.
- She extended an invitation to the stakeholder group to engage in the creation of a consolidated smart thermostat program and requested that interested attendees reach out to her to stay informed of the process.




- Jack referenced the appendix on slide 61 about the costs of WarmChoice versus the costs of Ohio's Home Weatherization Assistance program (HWAP) program. WarmChoice services average about $5,700 per customer; the average cost per customer for HWAP is over $10,000. He noted that WarmChoice providers do good job keeping costs low by finding other resources.
- Jack shared video of a home with chickens in a basement where the customer's hot water tank was located to demonstrate that providers encounter unique challenges to provide services.
- Ron Rees of COAD commented that when interacting with National Association of State Community Service Programs (NASCSP), members comment on how fortunate Ohio is to have multiple energy efficiency and home repair funding streams to blend together to do better job with home weatherization assistance program. Ohio is one of only 6 states that leverages multiple funding sources well.
- Nicole Peoples of COAD commented that during a recent meeting with a Best Practices group that was sharing information on crew size and merging programs, she noted that WarmChoice allows providers to have matching

funds to serve homes that may have been previously deferred from receiving weatherization services.

- Jack asked for any additional comments, questions, or concerns. Hearing none, Jack adjourned the 1st COH DSM Stakeholder meeting of 2019.

# Columbia Gas of Ohio DSM Stakeholder Group
# Meeting 2
# 290 W Nationwide Blvd
# 1-290-C
# November 1, 2019
# 10:00 am

## Meeting Minutes

## Stakeholders Participating

Bethany Allen (IGS) via phone
Adrian Andrews (COH)
Marilyn Bussard (COH)
Carolyn Cox (ELPC) via phone
Dave Davenport (GLS)
Steve Garnack (MORPC)
Randy Hall (Cornerstone Energy) via phone
John Johnson, Jr (GLS)
David Jones (Atlas Butler)
Kris Klaus (OHBA)
John Laverty (COH)
Andrew Metz (COH)
Debbie Ohler (OBBS)
Nicole Peoples (COAD)
Sarah Poe (COH)
Chris Rausch (COH)
Brennan Riggs (PUCO) via phone
Dave Rinebolt (OPAE)
Jeff Scott (Fahlgren Mortine) via phone
Colleen Shutrump (OCC) via phone
Tonja Stewart (PUCO) via phone
Ryan Stredney (COH)
Matt Vorndran (COH)

# COH DSM Stakeholder Group Meeting

Columbus, Ohio
November 1, 2019

Columbia Gas of Ohio
A NiSource Company

## Agenda

- Safety Moment and Meet Safe
- Attendance and Introductions
  - Introductions
  - Opening remarks
    - Jack Laverty, Manager, Energy Efficiency
- 2019 Program Updates through 9/30/2019
- Regulatory Compliance Matters
- Adjournment

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- Jack Laverty welcomed meeting participants to the second Columbia Gas of Ohio DSM Group Stakeholder Meeting of 2019.

## Safety Moment – Winter Safety Tips

**Meet Safe**

**Winterize your automobile**

- Winter wiper blades
- Winter (snow) tires
- Washer fluid
- Winter safety kit
- Vehicle service
- Tire pressure
- Gas tank full
- Clean snow and debris from vehicle
- Window defrosters
- www.OhGo.com for current traffic and road conditions

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- Ryan Stredney presented the meet safe and safety moments providing in person meeting participants with information on being safe in the building, including the nearest emergency exits, and information on winterizing your automobile.

## Meet the COH EE Team

| Name | Title | Email |
|---|---|---|
| Sarah Poe | Manager of Energy Efficiency Programs | spoe@nisource.com |
| Adrian Andrews | WarmChoice Program Manager | aandrews@nisource.com |
| Larry Titus | Quality Assurance Representative | ltitus@nisource.com |
| Erv McKinney | Quality Assurance Representative | emckinn@nisource.com |
| Chris Rausch | Existing Buildings Program Manager | crausch@nisource.com |
| Ryan Stredney | New Buildings Program Manager | rstredney@nisource.com |
| Andrew Metz | Financial & Analytics Lead | ametz@nisource.com |
| Marilyn Bussard | Administrative Assistant | mbussard@nisource.com |
| Jack Laverty | Manager, Energy Efficiency | jlaverty@nisource.com |

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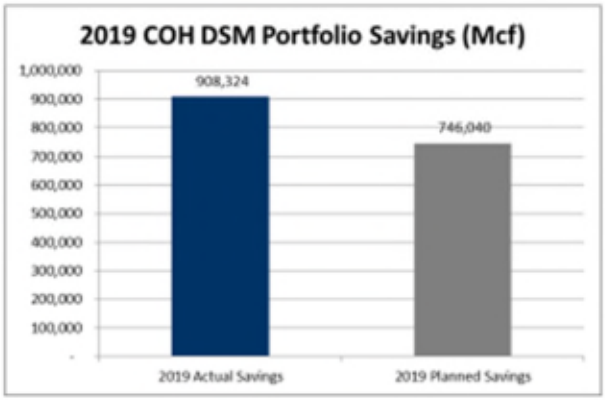
- Jack reviewed the EE team members including two contractors, Jeff Scott (Fahlgren Mortine) and Matthew Vorndran (CLEAResult).
- Attendees in person as well as those attending via phone introduced themselves.

## 2019 DSM Program – Metrics & Highlights (Jan. – Sept.)

- Exceeded planned natural gas savings target
  - Mcf savings, lifetime: 7,488,114
  - Reduced tons $CO_2$, lifetime: 44,929
  - Customers served: 596,167

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- Jack mentioned that during the first DSM Stakeholder Group of 2019 on June 28 we had reviewed the exceptional 2018 program year results as well as the DSM marketing plan for 2019.
- Today's meeting covers the first 9 months of performance for 2019. Jack introduced Sarah Poe to present the highlights for the period 1/1/2019-9/30/2019.

## 2019 DSM Program – Metrics & Highlights (Jan. – Sept.)

- Health and Safety (H&S) Statistics

| H&S Category | # Homes |
|---|---|
| Asbestos | 279 |
| Combustion Safety | 231 |
| Cracked Heat Exchanger | 450 |
| Gas Leaks | 110 |
| Mold & Moisture | 843 |
| Venting Issues | 1030 |
| Wiring Issues | 220 |

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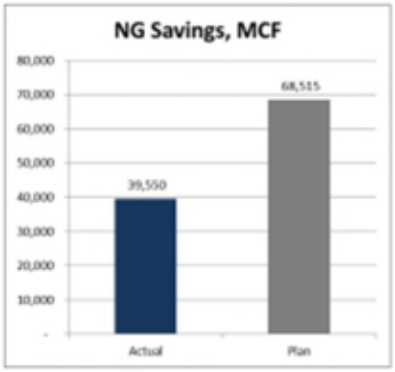
- Sarah reviewed health and safety metrics for the first 9 months. She mentioned that while in WarmChoice customers' homes, we're able to identify and mitigate health and safety issues to enable the weatherization process to proceed.
- Colleen Shutrump of the OCC asked if these issues were applicable to all customers served, not just low income customers. Sarah explained that these issues were identified through the Home Energy Audit/Rebates (HEA/R) and WarmChoice programs when auditors/inspectors are in the homes.
- Colleen wanted to know whether this included paying for the mitigation of health and safety issues for non-low-income customers. Sarah said that customers of the HEA/R program had to pay to have health and safety issues mitigated.

## WarmChoice® – Metrics (Jan. – Sept.)

- 63% of Customers; 58% of NG Savings Target

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- Adrian Andrews presented the WarmChoice metrics for first nine months of 2019.
- Program performance is typical for this point in time. Much of year is spent performing inspections, while weatherization work is completed throughout and towards the end of the year.

## WarmChoice® – Health and Safety Update

- Health and Safety Inspections detected and repaired in 2019:
  - 80 interior gas leaks
  - 450 cracked heat exchangers
  - 1,030 venting issues
- Leveraged Health and Safety Funding Sources
  - HWAP E – furnace, water heater, wiring and roof repair/replace
  - Area Office on Aging
  - Senior Programs
  - USDA Rural Housing/Housing Trust Fund
  - HomeServe Cares
- Other potential funding sources for non-energy efficiency health and safety?

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- Adrian indicated that the WarmChoice providers work hard to find additional funds to partner with WarmChoice funds. Some of those sources are listed on the slide.
- Adrian asked whether meeting participants had other funding source suggestions or recommendations for non-energy efficiency health and safety items. No suggestions or recommendations were forthcoming.

## WarmChoice® and Energy Assistance

- Coordinating with Columbia's Energy Assistance Team
  - Cross promotion of Energy Assistance and WarmChoice
    - Marketing materials
    - COH website
    - Emails
    - Events and Presentations
    - Organizations where customers seek assistance
- Collaborating on Customer Concerns
  - High bills/Payment plans
  - Appliance concerns
  - Comfort issues

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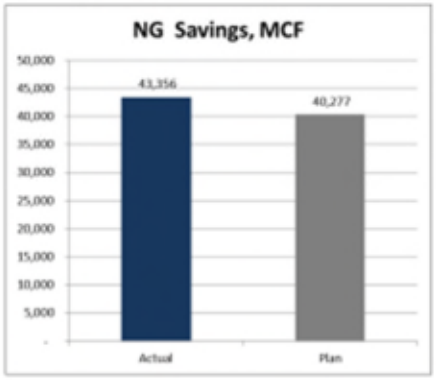
- Adrian discussed internal collaboration with the Columbia Gas energy assistance team, including referrals from the field and from the PUCO.

## Simple Energy Solutions – Metrics (Jan. – Sept.)

- 71% of Customers; 108% of NG Savings Target

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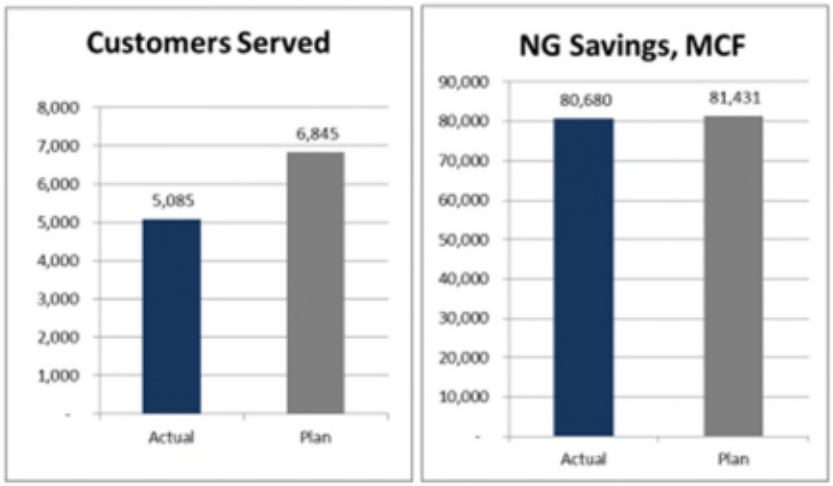
- Andrew Metz discussed the Simple Energy Solutions (SES) program metrics to date. He reiterated that many programs tend to have higher customer participation rates in the fall and winter, so we normally see an increase in last three months of the program year. For instance, SES is a good example since people like to buy techy gadgets for Christmas. We expect to participation rates increase toward the end of the year.

## Appliance Rebates – Metrics (Jan. – Sept.)

- 74% of Customers; 99% of NG Savings Target

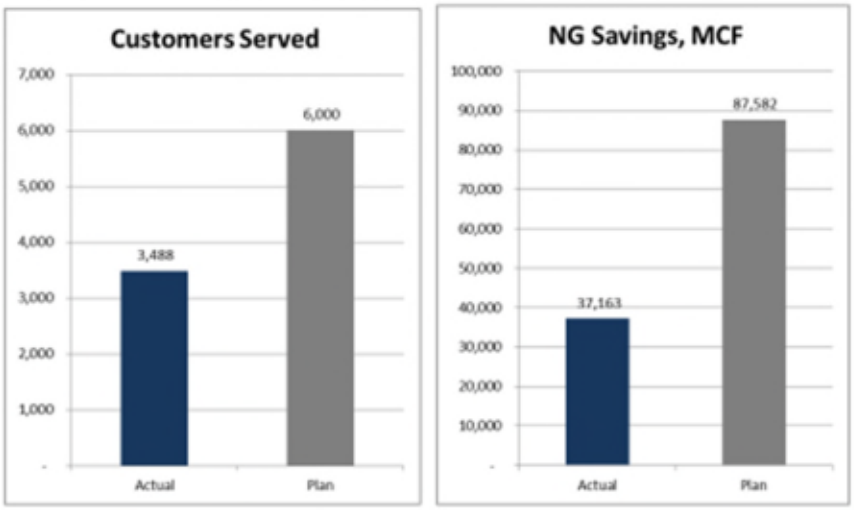





- Andrew reviewed the metrics of Appliance Rebates (AR) program for the first 9 months of 2019.

## Home Energy Audit and Rebates – Metrics (Jan. – Sept.)

- 58% of Customers; 42% of NG Savings Target

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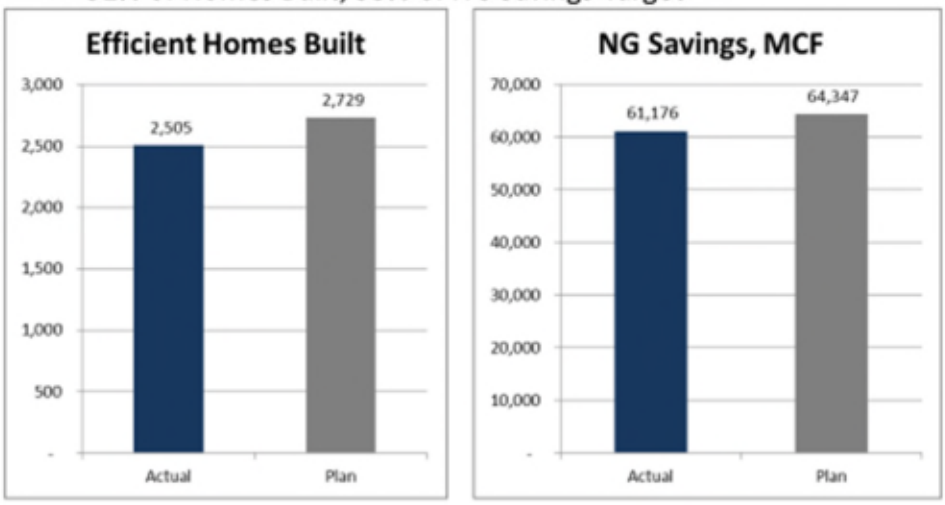
- Andrew reviewed the HEA/R program metrics for the first 9 months of the year. He said that the last three months are usually very big for program participation. Currently, many energy audits are booked. We expect to see another 1000 energy audits before the end of year.

## EfficiencyCrafted[SM] Homes – Metrics (Jan. – Sept.)

- 92% of Homes Built; 95% of NG Savings Target

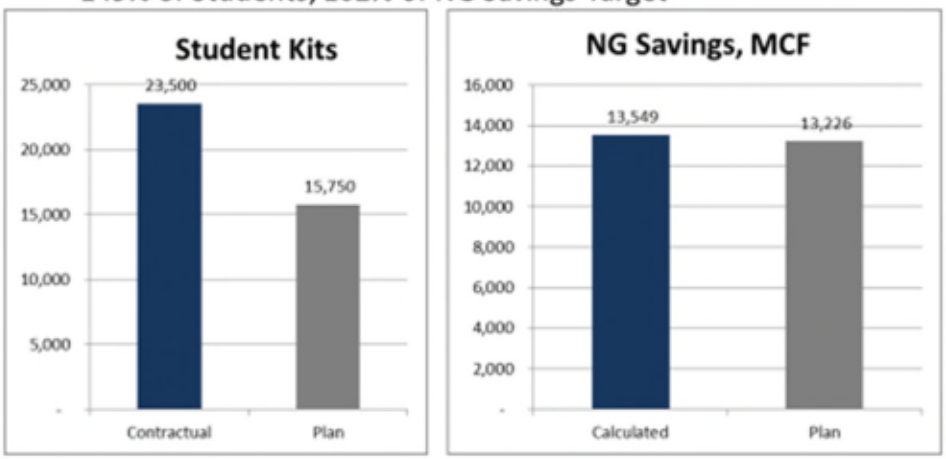





- Andrew reviewed the EfficiencyCrafted Homes (ECH) program metrics. He indicated this program usually slows down toward end of year as weather worsens or the building cycle is near completion.

## $e^3$ smart – Metrics (Jan. – Sept.)

- 149% of Students; 102% of NG Savings Target



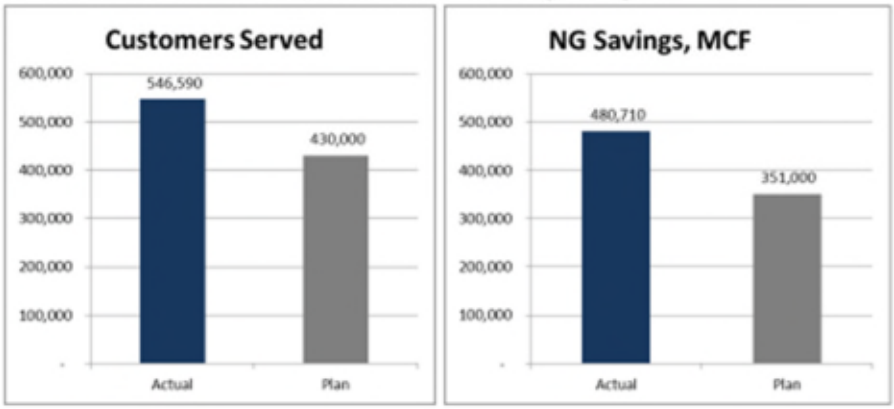

Actuals are not provided until January 2020



- Andrew reviewed the $e^3$ smart program metrics and noted that we won't get actual participation rates for this program until January 2020.

## Home Energy Efficiency Reports – Metrics (Jan. – Sept.)

- 127% of Customers; 137% of NG Savings Target

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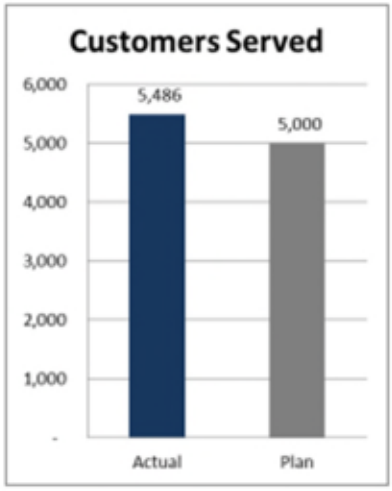
- Andrew indicated that Home Energy Efficiency Reports (HEER) was contracted to be well over goal for both customers and savings targets.
- He reminded the DSMSG that we had a new contractor this year.

## Home Energy Efficiency Checkup – Metrics (Jan. – Sept.)

- 110% of Customers

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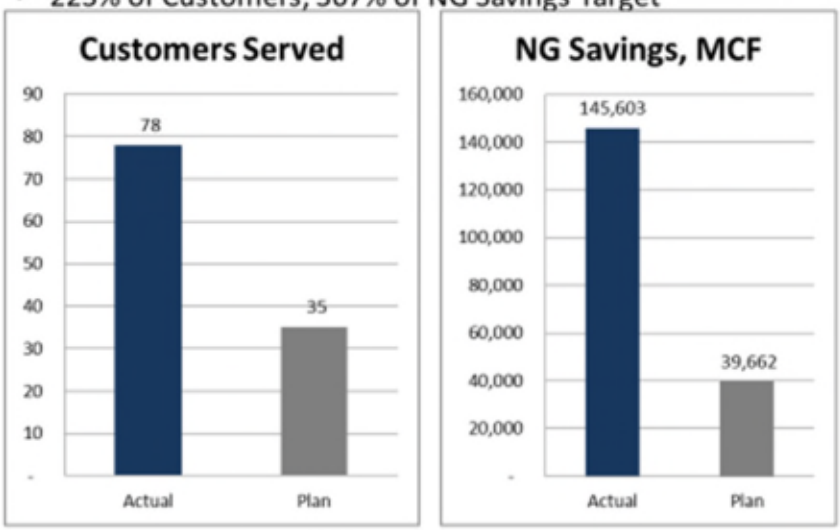
- Andrew reminded attendees that we had partnered with City of Columbus for the American Cities Climate Challenge and had found good ways of getting customers to take the on line energy audit through the Home Energy Efficiency Checkup (HEEC) program. This could be a record year for customer participation in this program.

## Innovative Energy Solutions – Metrics (Jan. – Sept.)

- 223% of Customers; 367% of NG Savings Target

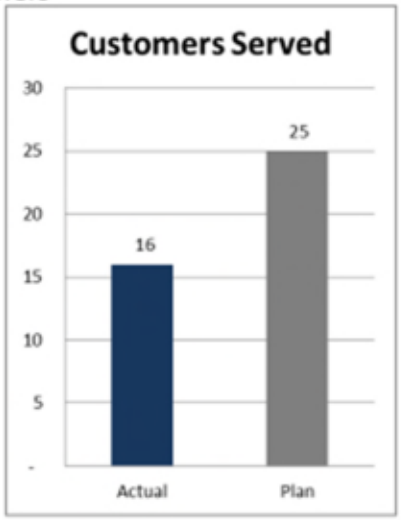





- Andrew reviewed the metrics for the Innovative Energy Solutions (IES) program.

## Small Commercial Construction – Metrics (Jan. – Sept.)

- 64% of Customers

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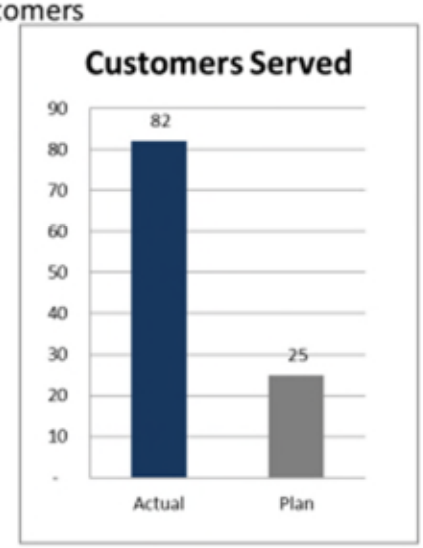
- Andrew reviewed the Small Commercial Construction (SCC) program metrics and indicated we should have more than enough participation to hit goal by end of year.
- Colleen Shutrump asked about the savings associated with the program; Andrew indicated that he thought it was over 5,000 Mcf, but that he didn't think there was a filed savings target for this program.
- Colleen asked a clarifying question about what measures were installed; Andrew indicated these were all new construction. Ryan Stredney stated that these were smaller new construction buildings and that the incremental natural gas savings were modeled with builder/designer ahead of time to implement as many natural gas energy efficiency measures as possible.

## EPA Portfolio Manager Automated Benchmarking – Metrics (Jan. – Sept.)

- 328% of Customers

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- Andrew noted that the EPA Portfolio Manager (EPAPM) program is relatively new and that 2019 will be the first full year.
- It appears as if well over 100 buildings were benchmarked through October and the number is constantly going up.

## 2019 DSM Portfolio Update

- 2019 EE program customer participation rates, as of September 2019 (75% of year complete)

| Program | 2017 Percent of Annual Customers Served Achieved (Thru September) | 2018 Percent of Annual Customers Served Achieved (Thru September) | 2019 Percent of Annual Customers Served Achieved (Thru September) |
|---|---|---|---|
| Home Energy Audits and Rebates | 39% | 57% | 58% |
| WarmChoice | 62% | 67% | 63% |
| Appliance Rebates | 58% | 64% | 74% |
| EfficiencyCrafted Homes | 57% | 83% | 92% |
| Home Energy Efficiency Reports | 124% | 127% | 127% |
| Simple Energy Solutions | 75% | 82% | 71% |
| $e^3$ smart | 134% | 134% | 149% |
| On Line Audit | 44% | 27% | 110% |
| Innovative Energy Solutions | 43% | 440% | 223% |
| Small Commercial Construction | 68% | 76% | 64% |
| EPA Portfolio Manager Automated Benchmarking | N/A | N/A | 328% |

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- Andrew reviewed year-over-year program performance for the same time period for 2019 compared to the same point in time in 2017 and 2018. He indicated that program performance in 2019 appears to be on track.

## Regulatory Compliance Matters

- On April 10, 2019, the Commission issued a Second Entry on Rehearing in Columbia's DSM Extension proceeding
- In that Entry, Columbia was ordered to work with AEP, FirstEnergy, CRES, and CRNG suppliers that serve any portion of Columbia's service area to develop a consolidated smart thermostat program
- Columbia held its first meeting of this working group on June 19, 2019
- Columbia has continued holding these meetings to refine and develop the online consolidated smart thermostat rebate process
- The next meeting will be held on Tuesday, December 10 at 10:00 am in Conference Room 380.

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- Jack reviewed the part of the Commission's Second Entry on Rehearing for our extension proceeding that mandated Columbia Gas to meet with electric partner utilities and gas and electric marketers to create a consolidated smart thermostat rebate. Those meetings have been ongoing since April 10 and will continue. Interested parties are encouraged to participate.

## Thank you!

- www.ColumbiaGasOhio.com/SavingMatters
- Jack Laverty, Manager, Energy Efficiency
  - jlaverty@nisource.com
  - 614-460-4714
- Have a safe day!

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- Jack reiterated that programs are in progress and many are ahead of goal. In some cases, we've already met or far exceeded the annual goal for some programs. Some programs will have participation rates that graph as an inverse bell curve where there is heavy participation in winter at beginning of the program year and heavy participation in fall and winter at end of the program year.
- In Columbus, we continue working on partnerships, one of which is the American Cities Climate Challenge (ACCC) that includes a goal to complete 30,000 home energy audits in Columbus in 2019/2020 combined. Jack encouraged meeting participants to participate in Columbia Gas' EE programs if they are Columbia Gas customers, whether they lived in Columbus or elsewhere.
- Jack asked whether there were any other comments, questions, or concerns. Hearing none, Jack thanked meeting participants and invited those present to stay if they want to talk further, and adjourned the meeting.

PUCO Case No. 19-1940-GA-RDR
ELPC Request for Production of Documents Set 1 No. 2
Respondent(s): Melissa L. Thompson
As to Objections: Joseph M. Clark

**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**REQUESTS FOR PRODUCTION OF DOCUMENTS**
**DATED MARCH 26, 2020**

RPD-1-2. Please provide any documents related to Columbia's plan for implementing a joint rebate program, including any description of the joint rebate program.

**RESPONSE:**

Objection. Columbia objects to this request inasmuch as it is unduly burdensome and overly broad. Specifically, there is no timeframe provided or other limiting parameters that would not require Columbia to produce virtually every document that mentions the joint rebate program. Moreover, due to the current Work at Home Order in Ohio, Columbia employees with responsive documents have limited access to their offices to review and retrieve potentially responsive documents.

Notwithstanding these objections, Columbia responds as follows:

Please see Columbia's Response to ELPC Interrogatory Set 1, No. 1; ELPC Interrogatory Set 1, No. 2; ELPC Interrogatory Set 1, No. 3; and ELPC Interrogatory Set 1, No. 4.

PUCO Case No. 19-1940-GA-RDR
ELPC Request for Production of Documents Set 1 No. 3
Respondent(s): Melissa L. Thompson
As to Objections: Joseph M. Clark

**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**REQUESTS FOR PRODUCTION OF DOCUMENTS**
**DATED MARCH 26, 2020**

RPD-1-3. Please provide any documents related to Columbia's plan for marketing smart thermostats.

**RESPONSE:**

Objection. Columbia objects to this request inasmuch as it is unduly burdensome and overly broad. Specifically, there is no timeframe provided or other limiting parameters that would not require Columbia to produce virtually every document that includes marketing of smart thermostats. Moreover, due to the current Work at Home Order in Ohio, Columbia employees with responsive documents have limited access to their offices to review and retrieve potentially responsive documents.

Notwithstanding these objections, Columbia responds as follows:

Please see Columbia's Response to ELPC RPD Set 1, No. 1. Columbia is also assembling HIGHLY CONFIDENTIAL documents that it will supplement to this request for production of documents.

**COLUMBIA GAS OF OHIO, INC.**
**RESPONSE TO THE ENVIRONMENTAL LAW & POLICY CENTER**
**REQUESTS FOR PRODUCTION OF DOCUMENTS**
**DATED MARCH 26, 2020**

RPD-1-4. Please provide notes from any discussions with Commission Staff regarding the joint rebates for smart thermostats.

**RESPONSE:**

Objection. Columbia objects to this request inasmuch as it is unduly burdensome. Due to the current Work at Home Order in Ohio, Columbia employees with potentially responsive documents have limited access to their offices to review and retrieve potentially responsive documents.

## CERTIFICATE OF SERVICE

I hereby certify that a true copy of the foregoing Evidence submitted on behalf of the Environmental Law & Policy Center was filed electronically through the Docketing Information System of the Public Utilities Commission of Ohio on April 20, 2020. The PUCO's e-filing system will electronically serve notice of the filing of this document on counsel for all parties.

/s/ Caroline Cox
Caroline Cox (0098175)
Counsel of Record
Environmental Law & Policy Center
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Columbus, OH 43215
(312) 795–3742
ccox@elpc.org

**This foregoing document was electronically filed with the Public Utilities**

**Commission of Ohio Docketing Information System on**

**4/20/2020 4:14:48 PM**

**in**

**Case No(s). 19-1940-GA-RDR**

Summary: Entry of Evidence electronically filed by Ms. Caroline Cox on behalf of Environmental Law and Policy Center