

SUMMARY FROM THE
2024 CHARGED INAUGURAL
CONVENING REPORT

TARGETED & INTEGRATED DEPLOYMENT

CHALLENGES, LEAST-REGRETS SOLUTIONS, AND KEY TAKEAWAYS



Background

In April 2024, the CHARGED Initiative held its Inaugural Convening in Boulder, CO, where 60 participants from across the industry collaborated on potential electrification solutions across five utility-related workstreams: distribution system planning, rates and incentives, targeted and integrated deployment, grid connection, and distribution system operations. This factsheet shares the key outcomes of the targeted and integrated deployment working group, who focused on how utilities can better design, target, and integrate demand-side management (DSM) and electrification programs. *Targeted and integrated deployment* can increase adoption of electrification measures; increase program utilization and demand flexibility; and reduce distribution costs. The working group did not discuss non-wires procurement.

Key Takeaways

- ▶ **Targeted & integrated deployment is essential for scalable electrification** — Coordinating program design and deployment across disparate program offerings improves cost-effectiveness, enhances customer experiences, and increases program utilization.
- ▶ **Utilities face significant coordination challenges** — Internal silos and fragmented program designs limit effective customer targeting, data sharing, and cross-departmental collaboration.
- ▶ **Actionable solutions exist!** — Immediately available and high-impact solutions include improving coordination across utility departments; co-deploying DSM, electrification, and load management programs; and establishing strong industry partnerships.
- ▶ **Program information and data sharing are critical enablers** — Effective deployment depends on better data standardization, internal data sharing platforms to foster utility department coordination and mechanisms to share data and program information externally (such as making evaluation results publicly available).
- ▶ **Long-term progress requires collaboration** — Multi-utility pilots, standardized reporting, and partnerships across utilities, regulators, and industry are needed to scale electrification efforts.

What are the core challenges?

Core challenges to achieving targeted and integrated deployment can be summed up across three themes:

General Program Design	Using DSM programs for distribution-level services may require design changes including incentives, customer targeting, and internal/external utility coordination.
Targeting Deployment	Silos within utilities limit visibility between program and planning groups, limiting the ability to target grid constraints and make programs more cost effective.
Integrating Deployment	Utilities are not pursuing co-deployment of different kinds of programs, including DSM programs and rates.

What immediate, actionable deployment solutions exist?

Convening participants identified and prioritized 15 solutions, which we termed “least-regrets solutions”, based on electrification impact and ease of implementation.

RANK	DEPLOYMENT SOLUTIONS	ENTITIES RESPONSIBLE			
		UTILITIES/ PROGRAM ADMINS	REGULATORS	INDUSTRY (E.G., AGGREGATORS)	LOCAL GOV'T / NONPROFITS
1	Improve coordination across utility departments (e.g., planning, programs, rates)	○			
2	Co-deployment of programs (e.g., EE with DR)	○	○	○	
3	Establish industry partnerships (e.g., with fleet associations) to improve programs	○		○	○
4	Create customer-centric programs that streamline the customer experience and make delivery customer-centric (e.g., single point of contact)	○		○	
5	Portfolio-wide Key Performance Indicators	○			
6	Data-informed DSM program design that use planning and program data to target DSM programs locationally	○			
7	Partner with aggregators or enable DSM bidding	○		○	
7	Data standardization and validation	○	○		
8	Make program evaluations publicly available	○	○		
8	Integrate efficiency requirements into electrification programs	○	○	○	
9	Utility cross-departmental data sharing	○	○		
9	Consider load management programs for distribution services	○			
9	Target heat pump programs for propane and fuel oil customers	○			
9	Create an ecosystem of tools for disadvantaged communities (e.g., set-aside funds, support for applying for rebates)	○			○
9	Coordination of electrification with gas decommissioning	○	○		

For each of the three solutions prioritized by the working group, utilities and other actors can take the following immediate actions to deliver high-impact and achievable electrification outcomes:

PRIORITIZED SOLUTION ACTIONS

Improve coordination across utility departments	• Establish company-wide vision, mission, KPIs, roadmap (C-level driven) • Establish a cross-functional group within the utility and a customer advisory group • Improve departmental data exchange (e.g., planning, operations, and program groups) • Establish internal incentives/rewards for performance
Co-deployment of programs (DSM, electrification, and load management)	• Identify and communicate the value to the customer and the utility • “Pancake” existing siloed programs so that customers can stack enrollment and benefits • Develop comprehensive program success metrics & service performance requirements • Simplify/streamline the customer enrollment process and experience • Design tech-neutral programs/incentives and/or establish a menu for technology eligibility
Establish industry partnerships	• Build ecosystem of program partnerships (including with fleets, contractors, local agencies) • Create outreach plan to engage partners who will mutually benefit from better program design • Establish bidirectional communication of data, information, and program evaluations • Offer rewards/recognition for top performers

CHARGED has continued working on these issues in subsequent activities. See [Charged Resources](#), in particular, the 2025 Convening Report [Locational DSM and Program Harmonization](#) and [Streamlining](#) chapters.

This fact sheet summarizes the findings from the [Targeted & Integrated Deployment](#) chapter from the [CHARGED Initiative Inaugural Convening Report \(2024\)](#).

