

Memo



To: Energy Efficiency & Resource Management Council
From: EERMC Consultant Team
CC: Becca Trietch / OER
Date: July 22, 2021
Subject: EERMC Consultant Team 2nd Quarter Report

CONSULTANT TEAM

I. SUMMARY

This document summarizes the work completed by the EERMC Consultant Team (C-Team) during the second quarter of 2021 and gives a preview of our work ahead. Section II highlights each of the C-Team's tasks and deliverables in Q2 and when each occurred. Each item is organized to align with the C-Team's [Scope of Work \(SOW\)](#) which was presented at the December 2020 EERMC meeting. Section III previews the key issues, deliverables, and tasks that the C-Team has identified, and in some cases, is already working on, in Q3. As with Section II, these items are organized by task as outlined in our SOW. Finally, Section IV presents the timeline associated with the 2022 Plan Core and Variable Factors that the C-Team referenced in [a presentation](#) to the Council at its March EERMC meeting.

II. UPDATES ON KEY AREAS OF WORK IN Q1

Task 1: EERMC Oversight

Task #	Activity	Tasks/Deliverable	Date(s)/Time Period
1.1	EERMC Meetings	Reviewed and provided feedback on April, May, and June meeting agendas with OER.	2 weeks prior to meetings
		Developed 15 presentations and memos for April, May, and June meetings. Presentation and memo topics included: EERMC priorities on the 2022 EE Plan, EERMC Retreat Planning, EERMC Website Updates, EE and SRP Technical Working Group Updates, C-Team Workplan, PUC Rulings (Efficient Buildings Fund, Performance Incentive Mechanisms), 2020 Year-End Program Performance, 2021 Q1 Program Results, 2022 Planning Deep Dive Meetings, 2021 Avoided Energy Supply Component (AESC) Study, 2022 Energy Efficiency Plan Outline Memorandum, 2021 Annual CHP Stakeholder Meeting	1 week prior to meetings
		Attended and participated in meetings with relevant subject-matter experts.	April 22 May 20 June 17
1.2	EERMC Executive Committee Meeting	Participated in the June meeting and presented update on C-Team scope of work.	June 3

1.3	Councilor Briefings	Provided updates and responses to queries on EE Legislation, equity, and multifamily issues for Council members Case, Teichert and Hubbard.	April - June
1.4	Councilor Retreat & Orientation	Compiled and presented results of Council member survey to identify desired retreat topics and formats.	April
		Organized and implemented the first of two Council member retreat sessions.	May 28
		Initiated ongoing follow-up activities based on requests made during retreat.	May - June
1.5	EE & SRP Technical Working Groups (TWG)	Attended all six Q2 TWG meetings with relevant staff assigned to participated in each.	April 21 (SRP) April 29 (EE) May 19 (SRP) May 27 (EE) June 16 (SRP) June 24 (EE)
1.6	Equity Working Group	Monitored high level updates from OER and National Grid, but not afforded direct access to meetings. Continued to monitor and document equity initiatives in neighboring jurisdictions to support best practice integration in RI efforts/planning.	April - June
1.7	EERMC Education Working Group	Scheduled and facilitated monthly meetings. Supported monthly meeting discussions with meeting preparation and distribution of notes and follow-up tasks. Topic areas covered included: Education RFPs for videos, public outreach, and K-12 Education; NEED curriculum & workshops; EERMC annual report; EERMC member retreat; EERMC website updates; Council support for market-based training & education programs; Annual CHP stakeholder meeting	April 7 May 5
1.8	OER/Division/C-Team Meetings	Attended bi-weekly check-in meetings to coordinate with state agencies on EE topics and issues relating to LCP.	April - June
1.9	OER/National Grid/C-Team Meetings	Attended bi-weekly check-in meetings to coordinate on issues relating to National Grid delivery and design of programs and resulting communications with the EERMC.	April - June
1.10	Refresh & Maintain Website	Uploaded all Council meeting materials and other relevant documents.	Ongoing
		Implemented a variety of content and organizational updates to EERMC website based on prior survey and ongoing feedback from education working group.	April - May
		Presented website updates during Council retreat session one.	May 28
1.11	Educational Tools	Presented EERMC Council Member Handbook during the Council Retreat.	May 28

1.12	Manage Consultants as Needed	Assisted in development and distribution of RFPs to solicit consultant services in support of Council education goals and activities.	April - June
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Task 2: Development of Work Products and Representation of the EERMC

Task #	Activity	Tasks/Deliverable	Date(s)/Time Period
2.1	EERMC Annual Report	Produced final draft of EERMC Annual Report for Council vote and submission to the General Assembly and Governor.	April – May
		Posted final Annual Report to EERMC website & distributed to members.	May
2.2	State & Regional Policy	Monitored application and any developments on the AESC Study.	April - May
		Continued oversight and monitoring with OER and National Grid of the Northeast Energy Efficiency Partnership (NEEP)'s RI State Partnership MOU Agreement tasks and deliverables.	April - June
		Continued monitoring of draft legislation proposed in the General Assembly that impact LCP, including Act on Climate, LCP extension and Appliance Standards, including discussions with stakeholders and development of background information and data on the proposed bills.	April - June
2.3	Stakeholder Forums	Supported the development and scheduling of a third Multifamily Brainstorming Session with National Grid including stakeholders from RI Housing, the Housing Network, CDCs, developers, and the lead vendors for the retrofit and new construction Multifamily programs.	April - May
		Participate in ad hoc check-in calls with stakeholders, including Acadia Center and Green Energy Consumers Alliance.	May - June
		Attended Income Eligible Best Practices meetings with National Grid and the CAP Agencies.	June 3
2.4	Annual Timeline	Monitored adherence to agreed-upon schedule, adding reminders as needed.	April - June
2.5	Quarterly Written Progress Reports	Assembled content throughout Q2 for inclusion in the first report to be issued in July.	April-June

Task 3: Energy Efficiency and System Reliability Program Design and Delivery

Task #	Activity	Tasks/Deliverable	Date(s)/Time Period
3.1	Residential & Income Eligible Sector Monthly Meetings	<p>Coordinated, drafted agendas, and facilitated monthly meetings. Meeting topics included:</p> <p>Review and discussion on the C-Team's draft implementation and oversight tracker, discussion on standardized meeting content, cadence of data sharing, review and discussion on tracking metrics, methods, and timelines for Residential commitments in the 2021 plan, review, and discussion on upcoming 2021 Residential RFPs, all in addition to standing agenda item of monitoring monthly program performance.</p>	<p>April 1 May 5 June 3</p>
		<p>Reviewed and transformed raw data on program activity from National Grid into a monthly data report. Distributed data report to sector team, including OER and Division. Reviewed data and sent questions to National Grid team for response.</p> <p><i>Note – This applies to both the residential/income eligible and the C&I sectors and is not repeated under Task 3.2.</i></p>	<p>3-week process in advance of each sector team meeting</p>
		<p>In Q4 of 2020, the C-Team developed a commitments tracker which includes all of the commitments made by National Grid in its 2021 Annual Plan. In Q1 of 2021, the C-Team worked with National Grid, OER, and the Division to review and come to a consensus on appropriate metrics, methods, and timelines for tracking each of the commitments made. Appropriate metrics, methods, and timelines for tracking each commitment were finalized early in Q2 and was reported on to the Council in the C-Team's Q1 update presentation at the May Council meeting.</p> <p><i>Note – This applies to both the residential/income eligible and the C&I sectors and is not repeated under Task 3.2.</i></p>	<p>April - June</p>
3.2	Commercial & Industrial Sector Monthly Meetings	<p>Coordinated, drafted agendas, and facilitated monthly meetings. Meeting topics included:</p> <p>Review and discussion on the C-Team's draft implementation and oversight tracker, discussion on standardized meeting content, cadence of data sharing, review and discussion on tracking metrics, methods, and timelines for Commercial & Industrial commitments in the 2021 plan, review, and discussion on 2021 Commercial & Industrial RFPs, and discussion on future sector team meeting topics, all in addition to standing agenda item of monitoring monthly program performance.</p>	<p>April 1 May 5 June 3</p>

3.3	EM&V: C&I and Residential Studies	Coordinated, drafted agendas, and facilitated monthly meetings.	April 7 (C&I) April 28 (Res) May 5 (C&I) May 24 (X-Sector) May 26 (Res) June 2 (C&I) June 23 (Res) June 28 (Res)
		Planning Activities Initiated critical planning discussions, including assessment of which RI and MA EM&V studies will be completed in time to incorporate findings into 2022 EE Plan.	
		Initiated conversations regarding planned EM&V activities in 2022. Includes discussion of EM&V studies to be conducted as well as ensuring recommendations from Legislated Study are discussed and incorporated into 2022 activities.	
		Initiated Key Studies Participation and Non-Participation Studies work plans, interview guides reviewed. Engaged in significant discussion on solar inverter power factor correction pilot	
		Completed Studies - Jobs Study - Home Energy Monitoring (Sense) Demonstration - Gas Peak Demand	
3.4	2022 Annual Plan Development	Coordinated, drafted agendas, and facilitated 3 Residential Deep Dive planning meetings to discuss high-priority measures or initiatives for Residential programs in the 2022 annual plan. These meetings touched on important changes or potential enhancements to program offerings, and topics covered included: Income Eligible, Multifamily, and Residential Retrofit. The C-team shared best practices and research from other jurisdictions and provided input on National Grid's plan outline memo relevant to these topics.	April 29 May 25 June 23
		Coordinated, drafted agendas, and facilitated 3 C&I Deep Dive planning meetings to discuss high-priority measures or initiatives for C&I programs in the 2022 annual plan. These meetings touched on important changes or potential enhancements to program offerings and topics covered included: Small Business, C&I New Construction Redesign, and Retro-commissioning. The C-team shared best practices and research from other jurisdictions and provided input on National Grid's plan outline memo relevant to these topics.	April 29 May 26 June 24
		Coordinated, drafted agendas, and facilitated 2 cross-cutting Deep Dive planning meetings to discuss issues/topic areas that	

		span multiple sectors. The 2 Deep Dive meeting topics were Active Demand Management and Workforce Development.	May 17 June 14
		Review and comment on National Grid's 2022 Draft Plan Outline Memorandum in preparation for first draft plan release in July.	June
3.5	CHP Annual Public Meeting	Organize and implement Annual CHP Stakeholder Meeting to fulfill statute and collect informed feedback on National Grid CHP offerings.	May-June
3.6	PUC Technical Sessions & Open Meetings on 2022 EE and SRP Plans	Rulings issued in EE Performance Incentive Mechanism and EBF Funding allocation for 2021 during PUC open meeting.	April 29
		Preliminary preparation for SRP Technical Session in July	June
		Coordinated with PUC staff on potential dates/topics for an EE Technical Session in Q3; Meetings with stakeholders to review potential topic areas to propose to PUC.	June
3.7	Cost-Effectiveness Analysis & Report	No dedicated activity on this in Q2.	n/a
3.8	Quarterly Memos	Developed and submitted EE & SRP TWG summary reports to EERMC.	April - June
3.9	Oversight of Third-Party Studies	No dedicated activity on this in Q2.	n/a

Task 4: Advancing Integrated Approaches and Addressing Emerging Issues

Task #	Activity	Tasks/Deliverable	Date(s)/Time Period
4.1	Scoping Meetings with OER and/or EERMC	Met with OER, National Grid, and DPUC to assess the opportunity for Gas Demand Response (DR) in Rhode Island. C&I discussion centered on the Aquidneck Island study, lessons learned, and other potential inputs and avenues for fully understanding the potential for Gas DR. Residential discussion covered range of perspectives on what opportunities may exist and how they could be monetized.	May 5
4.2	Analysis, Research Papers, White Papers	No dedicated activity on this in Q2 beyond materials developed for EERMC meetings.	n/a

III. KEY ISSUES, DELIVERABLES, AND TASKS UPCOMING IN Q2

Task #	Task Name	Key Activities	Time Period
1	EERMC Oversight	Council meetings - review agendas, develop content, and attend meetings.	Ongoing
		Attend Executive Committee meeting(s) as scheduled.	September
		Attend monthly EE and SRP TWG meetings.	Ongoing
		Follow-up on outcomes from Council Retreat and schedule and organize Session 2.	
		Monitor activity related to the Equity Working Group	Ongoing
		Schedule and facilitate monthly EERMC Education Working Group meetings.	Ongoing
		Attend bi-weekly check-in meetings with OER, Division, and C-Team.	Ongoing
		Attend bi-weekly check-in meetings with OER, National Grid, and C-Team.	Ongoing
		Implement appearance upgrades to EERMC website.	Q3 and Q4
		Schedule 1-1 EERMC member meetings, upon request	Ongoing
		Hold onboarding meeting with Councilor AnderBois	July 14
		Upload all Council meeting materials and other relevant documents.	Ongoing
		Update Council handbook in preparation for the second retreat session.	Q3
Kick-off activities for the Council education goals and activities will begin once contracts are finalized.	As scheduled		
2	Development of Work Products and Representation of the EERMC	Support discussion on whether to print and distribute copies of the EERMC Annual Report.	Q3
		Participate in upcoming Multifamily stakeholder meeting.	August 3
		Attend Income Eligible Best Practices meeting.	August 19
3	Energy Efficiency and System Reliability Program Design and Delivery	Coordinate, draft agendas, and facilitate monthly residential and C&I sector strategy team meetings.	Ongoing
		Coordinate, draft agendas, and facilitate monthly residential and C&I sector EM&V meetings. Continue discussions on planning activities related to EM&V. Continued review and discussions on all initiated and ongoing EM&V studies.	Ongoing

		Coordinate, draft agendas for, and facilitate additional 2022 Annual Plan deep dive meetings as needed.	TBD
		Review and provided feedback on draft SOWs for upcoming procurements related to the delivery of various residential and C&I programs and initiatives. The C-Team is currently in the process of reviewing five SOWs.	July - September
		Review and provide comments on the First Draft of the 2022 Annual Energy Efficiency Plan. Review, provide feedback on, and develop Council recommendations on Final Draft of the 2022 Annual Energy Efficiency Plan.	July - September
		Attend SRP Technical Session	July 26
		Develop drafts of the Cost-Effectiveness Report on the 2022 Plan	August - September
		Provide updates to Council on Commitments from 2021 Plan as part of our Q2 update.	August
4	Advancing Integrated Approaches and Addressing Emerging Issues	Meet with OER, National Grid, and DPUC to discuss Active Demand Response (ADR) Performance Incentive Mechanism (PIM) for National Grid's electric demand response programs.	July - September

IV. TIMELINE FOR CORE AND VARIABLE FACTORS IN 2022 PLANNING

Core Factors	Timeline
Targets and Resulting 3-Year Plan	Completed - To be referenced throughout 2022 Plan development
LCP Standards	Completed - To be referenced throughout 2022 Plan development
Previous Year's Results	Final report issued in May by National Grid
Current Year's Implementation Experience (including Pilots)	Ongoing
Program Evaluation, Measurement and Verification	Ongoing
Avoided Energy Supply Component Study (AESC)	Report on results in April

Variable Factors	Timeline
EERMC & Other Stakeholder Priority Lists	Completed
"Innovation" - Evolving markets & new and/or improved technologies	In Process and Ongoing in Q3
Regulatory: Public Utilities Commission	Ongoing
State & Local Policy Objectives	Ongoing
Other state agencies and quasi-agencies	Ongoing
Legislative	Ongoing