

# Memo



**To:** Energy Efficiency & Resource Management Council  
**From:** EERMC Consultant Team  
**CC:** Nathan Cleveland / OER  
**Date:** November 12, 2021  
**Subject:** EERMC Consultant Team 3<sup>rd</sup> Quarter Report

CONSULTANT TEAM

## I. SUMMARY

This document summarizes the work completed by the EERMC Consultant Team (C-Team) during Q3 of 2021 and gives a preview of our work ahead. Section II highlights each of the C-Team's tasks and deliverables in Q3 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 Q4. 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 July 29th, August 19th, September 16th, and September 23rd meeting agendas with OER.	2 weeks prior to meetings
		Developed 16 presentations and memos for July, August, and September meetings. Presentation and memo topics include:  National Grid 2022 Annual Energy Efficiency Plan Drafts and Cost-Effectiveness Report, National Grid request for Overspend Approval for the Gas Portfolio, SRP Year-to-Date activities, SRP Technical Working Group meetings, Energy Efficiency Program Results through Q2, EM&V and Benefit-Cost Model Updates, Northeast Energy Efficiency Partnerships (NEEP) - RI EE Partnership, and Equity Working Group EE Program Plan recommendations.	1 week prior to meetings
		Attended and participated in meetings with relevant subject-matter experts.	July 29 August 19 September 16 September 23

1.2	EERMC Executive Committee Meeting	No Executive Committee meetings were held in Q3.	
1.3	Councilor Briefings	Provided updates and respond to queries on 2022 EE Planning, including equity and IES/MF issues, LCP standards, rate and bill impacts, and other issues for council members Case, Teichert and Hubbard.	July - September
1.4	Councilor Retreat & Orientation	Held customized new Council member orientation with Sue AnderBois.	July 14
		Completed actionable follow-ups from the first retreat session.	July – September
		Began organization of the second of two Council member retreat sessions to be held in October.	September
1.5	EE & SRP Technical Working Groups (TWG)	Attended all EE and SRP TWG meetings from July through September with relevant staff assigned to participated in each.	July 21 (SRP) July 22 (EE) August 18 (SRP) August 26 (EE) Sept 15 (SRP) Sept 24 (EE)
1.6	Equity Working Group	Monitored high level updates from OER and National Grid, but not afforded direct access to meetings.	July-August
		Review recommendations EWG and associated commitments in 2022 EE Plan.	September
1.7	EERMC Education Working Group	Planned and facilitated monthly meetings. Supported monthly meeting discussions with meeting preparation, distribution of meeting notes and follow-up tasks.	July 7 August 4 September 1
		Topic areas covered included: lecture series, public forum, educational videos, and K-12 teacher training	
		Held supplemental meetings as needed for event and video planning.	July - September
		Managed consultants; Reviewed and contributed content for upcoming consultant deliverables.	July - September
		Assisted consultant with organization and implementation of the first of three EERMC energy lectures.	August - September
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.	July-September
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.	July-September

1.10	Refresh & Maintain Website	Managed online meeting calendar; Uploaded all Council meeting materials and other relevant documents.	July - September
1.11	Educational Tools	Initiated development of educational video series in partnership with OER.	August - September
1.12	Manage Consultants as Needed	Assisted in selection process for three RFPs to implement the Council's public education activities.	July - September
		Oversight of 2020 K-12 teacher training contract and deliverables.	July - September
		Kicked off all three education contracts; Began ongoing management of selected education consultants Duffy & Shanley (D&S) and Green Buildings Research Institute (GBRI).	July - September

## Task 2: Development of Work Products and Representation of the EERMC

Task #	Activity	Tasks/Deliverable	Date(s)/Time Period
2.1	EERMC Annual Report	All activities associated with the EERMC Annual Report were completed in Q2. No activities related to this task in Q3.	N/A
2.2	State & Regional Policy	Monitored application of the AESC Study into the 2022 EE Plan.	July-September
		Continued oversight and monitoring with OER and National Grid of the Northeast Energy Efficiency Partnership (NEEP)'s <i>RI State Partnership MOU Agreement</i> tasks and deliverables.	July-September
		Continued monitoring of legislation that impacts LCP, including Act on Climate, LCP extension and Appliance Standards.	July-September
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 MF programs. Participation in that Session.	July - Support August 3 Session
		Ad hoc check-in calls with stakeholders, including Acadia Center and GECA.	July - September
		Attended Income Eligible Best Practices meetings with Grid and CAPs.	August 26
2.4	Annual Timeline	Monitored adherence to agreed-upon schedule, adding reminders as needed.	July-September
2.5	Quarterly Written Progress Reports	Completed and submitted for Q2 in advance of July Council Meeting	July 22

### 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	Coordinated, drafted agendas, and facilitated monthly meetings. Meeting topics included review and discussion on the C-Team's review and discussion on tracking metrics, methods, and timelines for Residential commitments in the 2021 plan, review and discussion on upcoming 2021 Residential RFPs, deep dives on Income Eligible Single Family program performance, check-in on 2022 planning, all in addition to standing agenda item of monitoring monthly program performance.	July 1 August 12 September 2
		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.  Note – This applies to both the residential/income eligible and the C&I sectors and is not repeated under Task 3.2.	3 week process in advance of each sector team meeting
		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 Q2 update presentation at the August Council meeting.  Note – This applies to both the residential/income eligible and the C&I sectors and is not repeated under Task 3.2.	July - September
3.2	Commercial & Industrial Sector Monthly Meetings	Coordinated, drafted agendas, and facilitated monthly meetings. Meeting topics included discussion of underperformance in the Large C&I retrofit programs, changes to the Small Business Direct Install programs and review of Commercial & Industrial commitments in the 2021 plan. We shared best practices from other jurisdictions on measures/offering like Retro-commissioning and small business weatherization. We also reviewed and discussed 2021 Commercial & Industrial RFPs and new approaches or measures that would be implemented in the 2022 Annual Plan.	July 1 August 12 September 2

3.3	EM&V: C&I and Residential Studies	<b>Planning Activities</b> - Concluded critical planning discussions, including assessment of which RI and MA EM&V studies were to 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.	July 16 (Leg Study) July 28 (Res) Aug 4 (C&I) Aug 8 (NC NTG) Aug 25 (Res) Sept 1 (C&I) Sept 22 (Res)
		<b>Tracked Ongoing Key Studies</b> - Participation and Non-Participation Studies work plans kicked off and many revised work area scopes and draft deliverables reviewed - Custom studies initiated for both Elec and Gas	
		<b>Completed Studies</b> - Nearly all 2021 EM&V studies completed on time for 2022 Planning - Cannabis baseline ISP a notable exception, and work continues here - Similarly, ongoing key studies above not completed yet	
3.4	2022 Annual Plan Development	Coordinated, drafted agendas, and facilitated an additional residential deep dive planning meetings to discuss important changes or potential enhancements to program offerings in the residential retrofit programs.	August 3
		In-depth review of Large CHP project proposed by National Grid including supplemental materials provided to the Division of Public Utilities and Carriers. This included a full review of project-specific savings analysis and benefit-cost screening with and without RI Economic Multipliers. Given concerns with this project, the C-team also analyzed how the proposed incentive spending could be re-allocated to serve more participants.	July - September
		Review and provide comments on National Grid's 2022 EE Plan. Review tasks included providing comments on all sections of the Plan narrative and analysis, comments, and questions on BC Models, Technical Reference Manuals, and rate and bill impact models. Review tasks were conducted on the First Draft of the Plan in July, on the interim update provided in August, and the Final Draft in September.	July - September
3.5	CHP Annual Public Meeting	No dedicated activity on this in Q3.	N/A

3.6	PUC Technical Sessions & Open Meetings on 2022 EE and SRP Plans	Coordinated with PUC staff on potential dates/topics for an EE Technical Session as well as EERMC/PUC Call in Q3, eventually delayed to early 2022; Meetings with stakeholders to review potential topic areas to propose to PUC. Coordination on CHP project / EE Plan separation for PUC filings.	July - September
3.7	Cost-Effectiveness Analysis & Report	Drafted CE Report for 2022 Annual EE Plan. Prepared for filing in October,	July - September
3.8	Quarterly Memos	Prepared and submitted memos summarizing EE & SRP Technical Working Group meetings for Council members.	July - September
3.9	Oversight of Third-Party Studies	No dedicated activity on this in Q3.	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	Conversations focused on scoping for 2022 EE Plan activities as part of Planning - incl. EM&V, rate and bill, etc.	July - September
4.2	Analysis, Research Papers, White Papers	Materials Developed for EERMC meetings; SRP presentation on expected valuation and option value.	July - September

### III. KEY ISSUES, DELIVERABLES, AND TASKS UPCOMING IN Q4

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.	November
		Coordinate Councilor briefings and 1-on-1 meetings on an as needed basis.	Ongoing
		Develop content for and implement Council Retreat Session 2.	October - November
		Begin planning for 2023 Council Retreat schedule.	December
		Attend monthly SRP TWG meetings. As a reminder, National Grid has cancelled EE TWG meetings for the remainder of 2021.	Ongoing
		Schedule and facilitate monthly EERMC Education Working Group meetings.	Ongoing

		Ad hoc meetings to continue work on event and video planning related to the Education Working Group.	Ongoing
		Consultant management and deliverables support related to the Education Working Group.	Ongoing
		Assistance with organization and implementation of EERMC Energy Lectures.	Q4
		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
		Continue updating Council website to promote education activities and resulting products.	Ongoing
		Install analytics to track traffic on EERMC website. Begin tracking traffic.	Q3 and Q4
		Continue development of educational video series in partnership with OER.	Ongoing into 2022
		Complete oversight of contract and deliverables for the 2020 K-12 teacher training.	October
		Upload all Council meeting materials and other relevant documents.	Ongoing
2	Development of Work Products and Representation of the EERMC	Development of 2022 Annual Report.	Q1 2022
		Complete and deliver written progress report on C-Team Activities for Q3.	November
		Ad-hoc check-in calls with stakeholders, including Acadia Center and GECA.	Ongoing
		Attend Income Eligible Best Practices meeting.	November
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. Continued review and discussions on all initiated and ongoing EM&V studies.	Ongoing
		Coordinate EM&V work areas for 2022.	Ongoing
		Begin planning for 2022 Annual CHP Meeting.	Q1 2022
		Continue to track and engage in discovery, testimony, and hearings related to the 2022 EE Plan.	Ongoing
		Attend SRP Technical Session	November
		Finalize and file Cost Effectiveness Report on 2022 Annual EE Plan.	October

		Provide updates to Council on Commitments from 2021 Plan as part of our Q3 update.	November
4	Advancing Integrated Approaches and Addressing Emerging Issues	Continue development and finalization of C-Team SOW for 2022, including new emerging areas for C-Team.	November-December
		Co-develop and deliver SRP presentation for November Council meeting.	November

#### 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)	Completed

Variable Factors	Timeline
EERMC & Other Stakeholder Priority Lists	Completed
"Innovation" - Evolving markets & new and/or improved technologies	In Process and Ongoing in Q4
Regulatory: Public Utilities Commission	Ongoing
State & Local Policy Objectives	Ongoing
Other state agencies and quasi-agencies	Ongoing
Legislative	Ongoing