

Memo



To: Energy Efficiency & Resource Management Council
From: EERMC Consultant Team
Date: April 27, 2022
Subject: EERMC Consultant Team 1st Quarter Report

CONSULTANT TEAM

I. SUMMARY

This document summarizes the work completed by the EERMC Consultant Team (C-Team) during Q1 of 2022 and gives a preview of our work ahead. Section II highlights each of the C-Team's tasks and deliverables in Q1 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 2021 EERMC meeting¹. Section III previews the key issues, deliverables, and tasks that the C-Team has identified, and in some cases, is already working on, in Q2. As with Section II, these items are organized by task as outlined in our SOW.

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 January 20 th , February 17 th , and March 17 th meeting agendas with OER.	2 weeks prior to meetings
		Developed 12 presentations and memos for January, February, and March meetings. Presentation and memo topics include: 2022 EE plan, PUC Hearing, and PUC Ruling Updates, 2022 EERMC Key Deliverables and Schedule, 2021 Consultant Team Budget Update, Revised 2022 C-Team SOW, Council Priorities for 2023 Plan, EE and SRP TWG meeting updates, 2021 Year-End Summary of C-Team Work, Update on 2021 Q4 Program Results, and Development of the 2022 EERMC Annual Report	1 week prior to meetings
		Attended and participated in meetings with relevant subject-matter experts.	January 20 February 17 March 17

¹ The C-Team has developed a revised SOW for its services to the EERMC for 2022 to be responsive to the rulings issued by the Rhode Island Public Utilities Commission (PUC) at its Open Meeting held on January 25, 2022, as well as input from the Council at its March EERMC meeting. Should the revised SOW be approved by the Council at its April meeting, the revised SOW would serve to replace the SOW for 2022 approved by the Council at its December meeting. Accordingly, future iterations of this update will be re-organized to align with the yet-to-be-approved revised SOW.

1.2	EERMC Executive Committee Meeting	Attended the January meeting.	January 20
1.3	Councilor Briefings	Met with Councilors over 10 times, including individual briefings with Councilors AnderBois, Case, Hubbard, and Verrengia.	January 18 January 19 January 20 January 21 January 24 January 26 February 2 February 16 February 23 February 24 March 9 March 21 March 30
1.4	Councilor Retreat & Orientation	Conducted a survey of Council members to inform future retreat planning.	February
		Included results of retreat survey in March Council meeting materials.	March 17
1.5	EE & SRP Technical Working Groups (TWG)	Attended all EE and SRP TWG meetings from January through March with relevant staff assigned to participated in each.	January 19 (SRP) February 16 (SRP) March 24 (EE)
1.6	Equity Working Group	Attended Q1 EWG Meeting.	March 25
1.7	EERMC Education Working Group	Planned and facilitated Q1 monthly meetings. Supported monthly meeting discussions through document preparation, distribution of meeting notes and completion of follow-up tasks. Topic areas included: K-12 educator training, energy lecture series follow-up, public forum planning, energy expo, educational video series, 2022 education budget, EERMC annual report, and Council member retreat.	January 5 February 2 March 2
		Managed consultant work on public events, educational video series, and K-12 training; Reviewed and contributed content for upcoming consultant deliverables, including video scripts, and agenda and marketing materials for lecture series and public forum; Coordinated C-Team, OER, and Council member input and feedback on work products.	January – March
		Held the third of three public energy lecture series virtually	January 25

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.	January – March
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.	January – March
1.10	Refresh & Maintain Website	Managed online meeting calendar; Uploaded all Council meeting materials and other relevant documents.	January – March
1.11	Educational Tools	Continued development of educational video series in partnership with OER. Worked with consultant to collect Council member input, draft content outlines for videos 1-10 and scripts for videos 1-3.	January – March
		Worked with GBRI to enhance NEED K-12 Energy Education Curriculum for use in 2022 educator workshop series.	January
1.12	Manage Consultants as Needed	Ongoing management of selected education consultants Duffy & Shanley (D&S) for EERMC public events and educational videos, and Green Buildings Research Institute (GBRI) for K-12 educator training.	January – March

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

Task #	Activity	Tasks/Deliverable	Date(s)/Time Period
2.1	EERMC Annual Report	Developed timeline, table of contents, and assigned sections to contributors. Coordinated among National Grid, OER, and C-Team to develop content for the first draft.	February – March
		Compiled first draft and included report and slides in March Council meeting materials.	March
2.2	State & Regional Policy	Participated in discussions with OER and National Grid on 2022 sponsorship of the Northeast Energy Efficiency Partnership (NEEP)'s proposal.	February – March
2.3	Stakeholder Forums	Attended Income Eligible Best Practices meetings with National Grid and CAPs.	March 24
2.4	Annual Timeline	Coordinated with OER and National Grid to develop a timeline of tasks and milestones for key EERMC responsibilities, with emphasis on the 2023 Annual Plan development, review and approval process.	January
2.5	Quarterly Written Progress Reports	Completed and submitted for Q4/Year-End in advance of the February Council Meeting	February 10

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 in February and March. Meeting topics included review and discussion on the C-Team’s draft implementation and oversight tracker based on the 2022 Plan, updates from OER on the 2021 RGGI funded heat pump fuel switching program, updates on a RFI for Virtual Assessments and Building Labeling, review of C-Team research on QA/QC best practices for the EnergyWise program, all in addition to the standing agenda item of monitoring monthly program performance.	February 3 March 3
		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 Q1 of 2022, the C-Team developed a commitments tracker which includes all of the commitments made by National Grid in its 2022 Annual Plan. In Q1, the C-Team worked with National Grid and OER to prioritize, assign metrics, and determine frequency and location of updates for each commitment. 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 review and discussion on the C-Team’s draft implementation and oversight tracker based on the 2022 Plan, preliminary 2021 year-end results and areas of program performance improvement, supply chain delay mitigation strategies, Small Business weatherization project delivery and calculator tools, upstream offerings for electric induction kitchen equipment, and steam trap repair and replacement offerings for Large C&I customers, all in addition to the standing agenda item of monitoring monthly program performance.	February 3 March 3

3.3	EM&V: C&I and Residential Studies	Planning Activities - Engaged in discussions with National Grid and study teams regarding ongoing and planned EM&V activities in 2022, including discussion of EM&V studies to be conducted in 2022. - Conducted initial discussions on relevant studies in other jurisdictions that would serve as meaningful inputs into the 2023 Plan development process, especially in order to reduce ratepayer dollars spent on Rhode Island-specific studies where possible.	Jan 26 (Res) Jan 27 (Participant) Feb 3 (C&I) Feb 16 (Solar PFC) Feb 23 (Res) Mar 9 (C&I) Mar 23 (Res) Mar 30 (CustGas)
		Tracked Ongoing Key Studies - Draft Participation and Non-Participation Study Reports under development by study teams, with results set to be available in early Q2. - Custom Electric and Gas PY 2020 Impact Evaluations underway.	
		Completed Studies - At least 11 completed studies will have results available for inclusion in the 2023 Plan - Impact Evaluation of PY2019 Custom Gas installations was completed and may also serve as 2023 Plan input	
3.4	2023 Annual Plan Development	Began initial scoping of timing and needs for 2023 Plan Development, including drafting lists of potential deep dive topics.	February - March
		Began drafting and discussing Council Priorities for 2023 Plan	February – March
3.5	CHP Annual Public Meeting	No dedicated activity on this in Q1.	N/A
3.6	PUC Technical Sessions & Open Meetings on 2023 EE and SRP Plans	While no PUC meetings related to the 2023 Plan were held, multiple meetings with the PUC were scheduled relating to the review and approval of the 2022 Plan. Subject-matter experts from the C-team attended hearings and open meetings held by the PUC. Meetings were also held to coordinate and prepare for PUC meetings with other stakeholders, including OER, the Division, and National Grid. Additionally, significant time was invested in preparing for hearings and reviewing and responding to information requests.	January 10 (Hearing) January 11 (Hearing) January 13 (Hearing) January 25 (Open Meeting) January 28 (Open Meeting)
3.7	Cost-Effectiveness Analysis & Report	No dedicated activity on this in Q1.	N/A

3.8	Quarterly Memos	Prepared and submitted memos summarizing EE & SRP Technical Working Group meetings for Council members.	February 17
3.9	Oversight of Third-Party Studies	No dedicated activity on this in Q1.	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 regularly with OER to review objectives and deliverables relating to EERMC meeting presentations.	January – March
4.2	Analysis, Research Papers, White Papers	Developed additional data analysis and reporting framework for C&I programs to track the efficacy of modified Performance Lighting offerings.	January - March
		Conducted research on QA/QC best practices to inform EnergyWise program design.	

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.	April
		Coordinate Councilor briefings and 1-on-1 meetings on an as needed basis.	Ongoing
		If directed, coordinate and develop content for Council education and advancement sessions.	April - June
		Assist with onboarding and orientation if new Councilors are confirmed and seated in Q2	TBD as necessary
		Attend monthly EE and SRP TWG meetings.	Ongoing
		Attend Q2 Equity Working Group Meeting	As scheduled
		Schedule and facilitate monthly EERMC Education Working Group meetings. Continued management of consultant work on public events, educational video series, and K-12 trainings.	Ongoing
		Attend bi-weekly check-in meetings with OER and National Grid	Ongoing
		Transition management of certain aspects of Council website over to OER	Ongoing

2	Development of Work Products and Representation of the EERMC	Produce final draft of EERMC Annual Report for Council vote and submission to the General Assembly	April – May
		Complete and deliver written progress report on C-Team Activities for Q1.	April
		Ad-hoc check-in calls with stakeholders, including Acadia Center and GECA.	Ongoing
		Attend Income Eligible Best Practices meeting.	June
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, as well as applicable studies from other jurisdictions.	Ongoing
		Coordinate, draft agendas for, and facilitate 2023 Annual Plan deep dive meetings.	April - June
		Review and comment on National Grid’s 2023 Plan Outline Memo	June
		Coordinate and host CHP Annual Public Meeting	Targeting May
		Provide update on EE and SRP TWG meetings	May – June
		Provide updates to Council on Commitments from 2022 Plan as part of our Q1 update.	May
4	Advancing Integrated Approaches and Addressing Emerging Issues	Continue development and finalization of C-Team SOW for 2022.	April