



STATE OF RHODE ISLAND  
**ENERGY EFFICIENCY &  
RESOURCE MANAGEMENT COUNCIL**

CONSULTANT TEAM



**Rhode Island  
Energy™**  
a PPL company

# 2022 Second Quarter Results Update

Presented to the EERMC By:  
EERMC Consulting Team  
Rhode Island Energy

**Date:** August 18, 2022





# Outline

---

Portfolio Performance

Sector Highlights

RI Energy Equity Update

Consultant Team Equity Update

Discussion

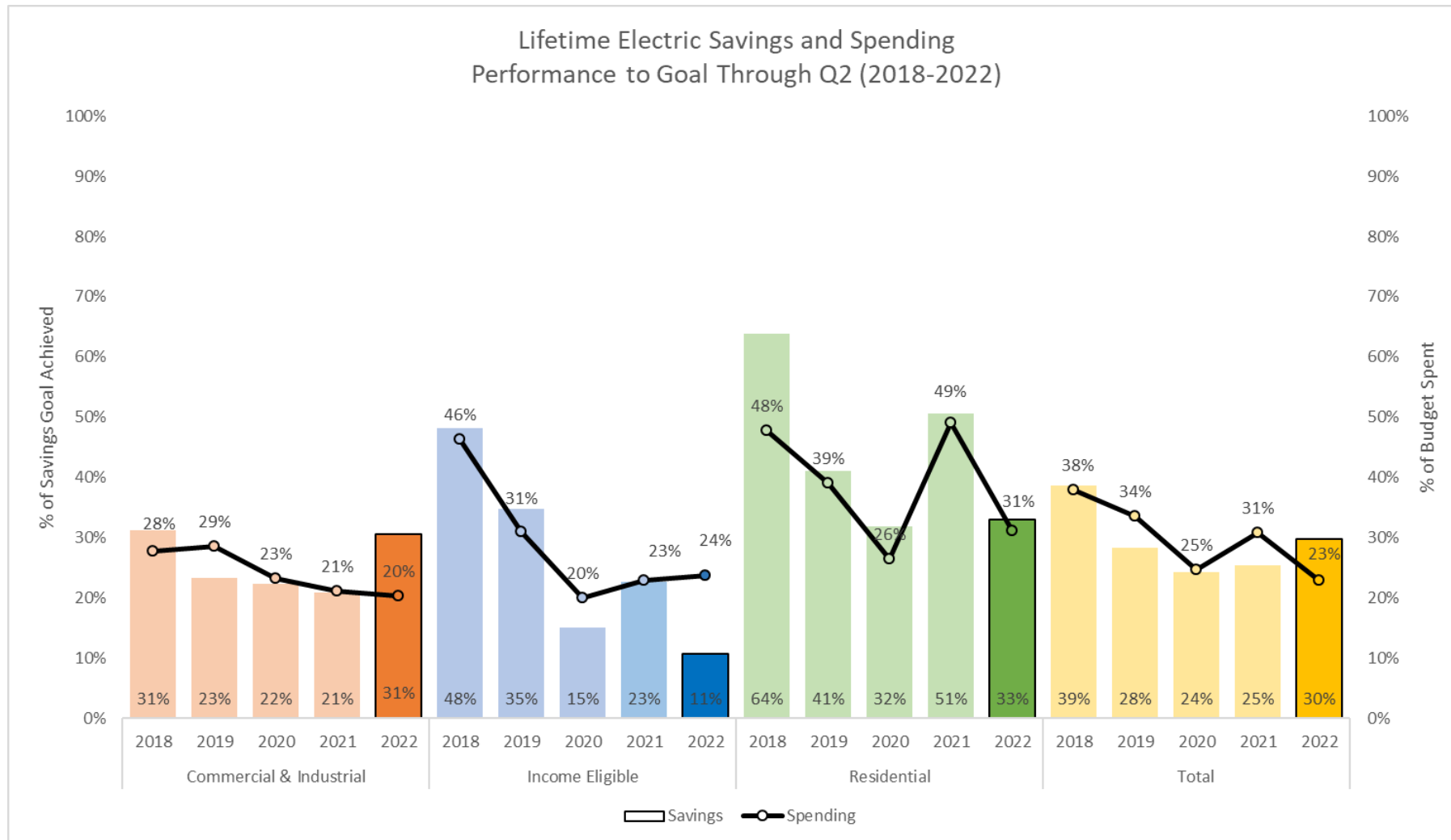


# PORTFOLIO PERFORMANCE



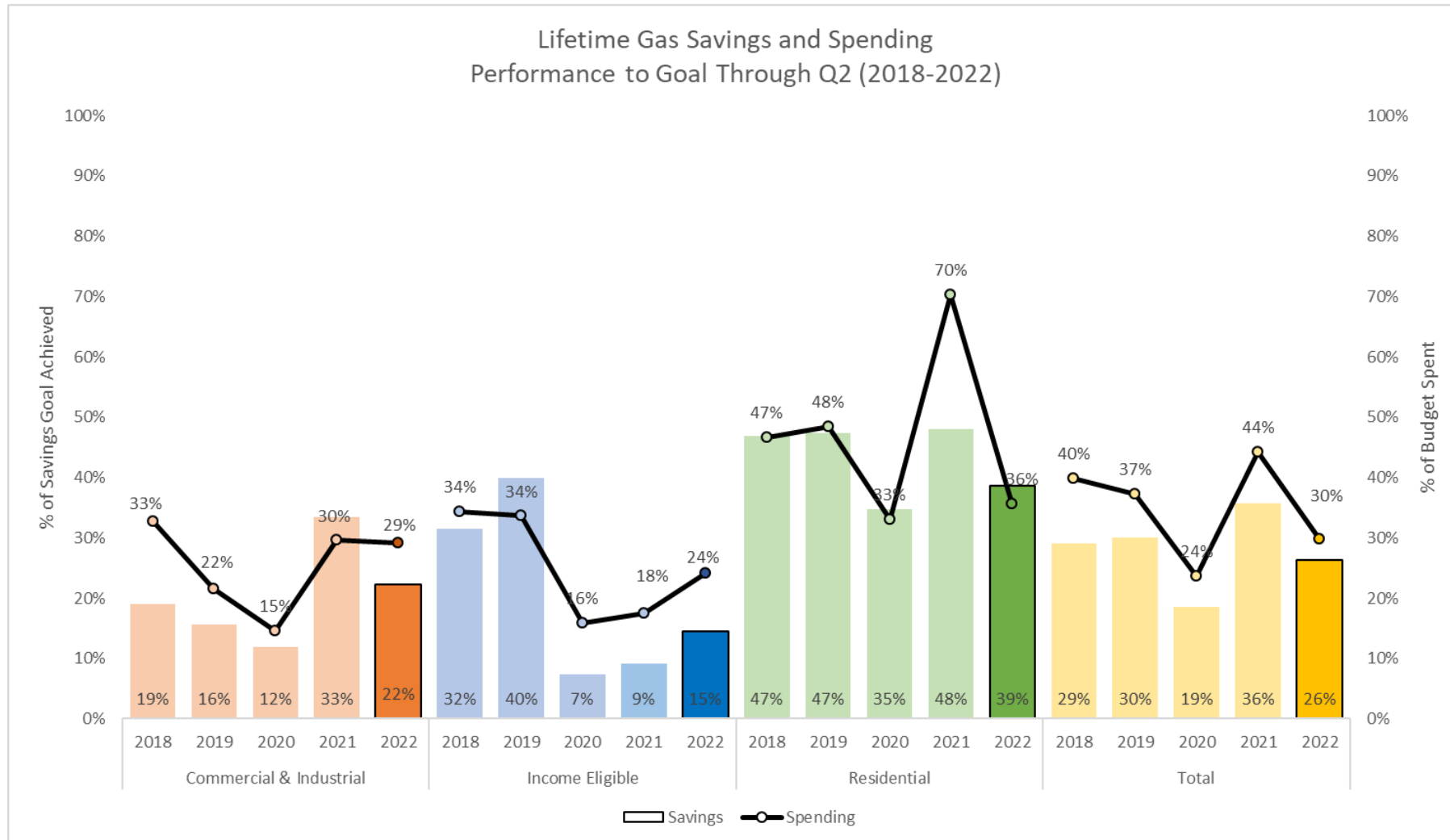


# Electric Performance





# Gas Performance





# SECTOR HIGHLIGHTS



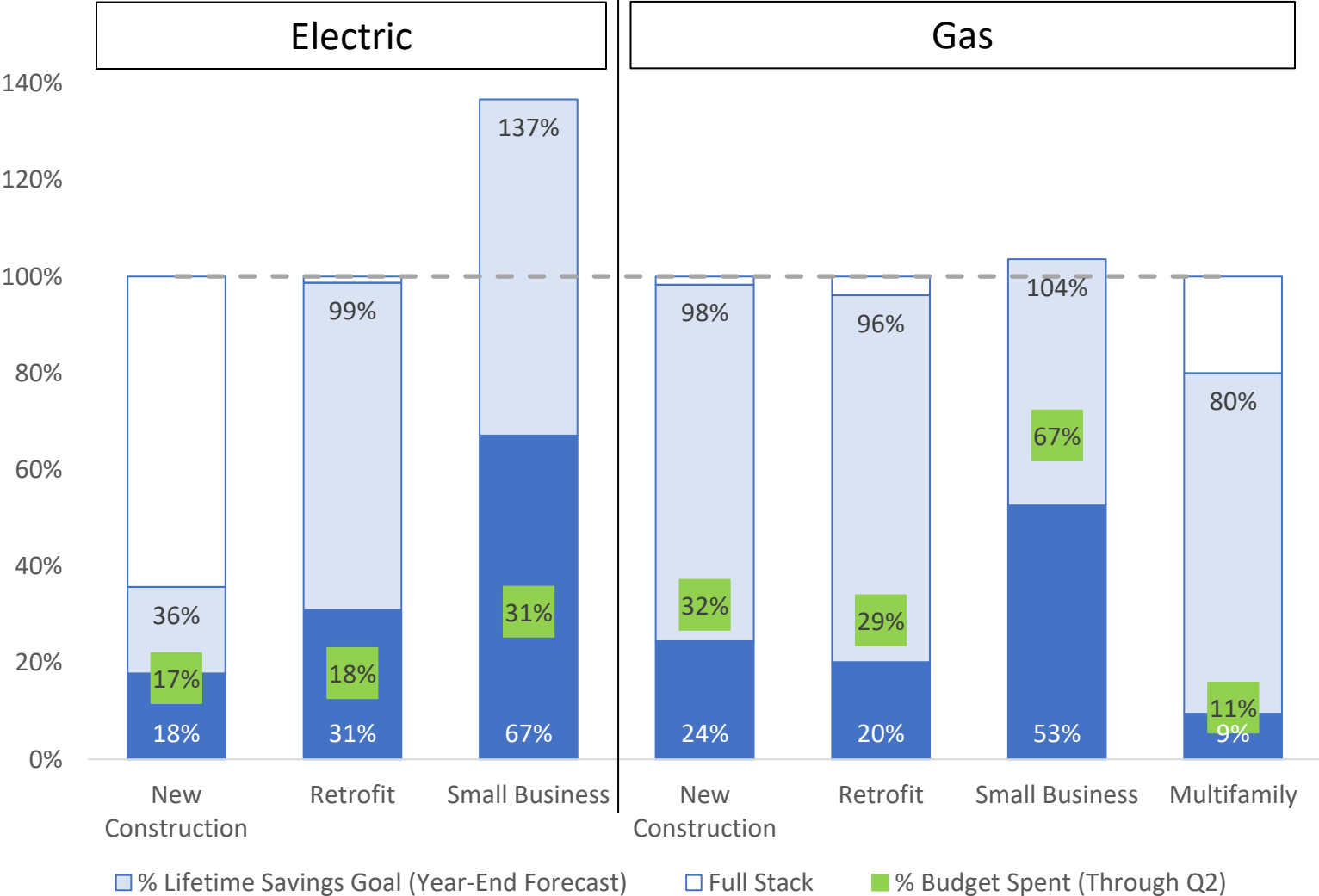


# Commercial & Industrial

Forecasted underperformance for:

- Electric Retrofit
- Electric New Construction
- Gas New Construction
- Gas C&I Multifamily

“Hockey stick” effect may be mitigated by project delays





# Select 2022 C&I Plan Commitments

## Monitoring-Based Commissioning (MBCx)

- Commitment
  - Beginning in 2022, the Company intends to begin funding MBCx set-up costs to share the risk taken on by customers adopting these systems. Through this process, the Company will also ensure an effective implementation by highly qualified vendors.
- Update
  - Building Analytics program implementation vendor selected in Q1. Program materials finalized and RFQ for service providers released in Q2. Launch and outreach in Q4.

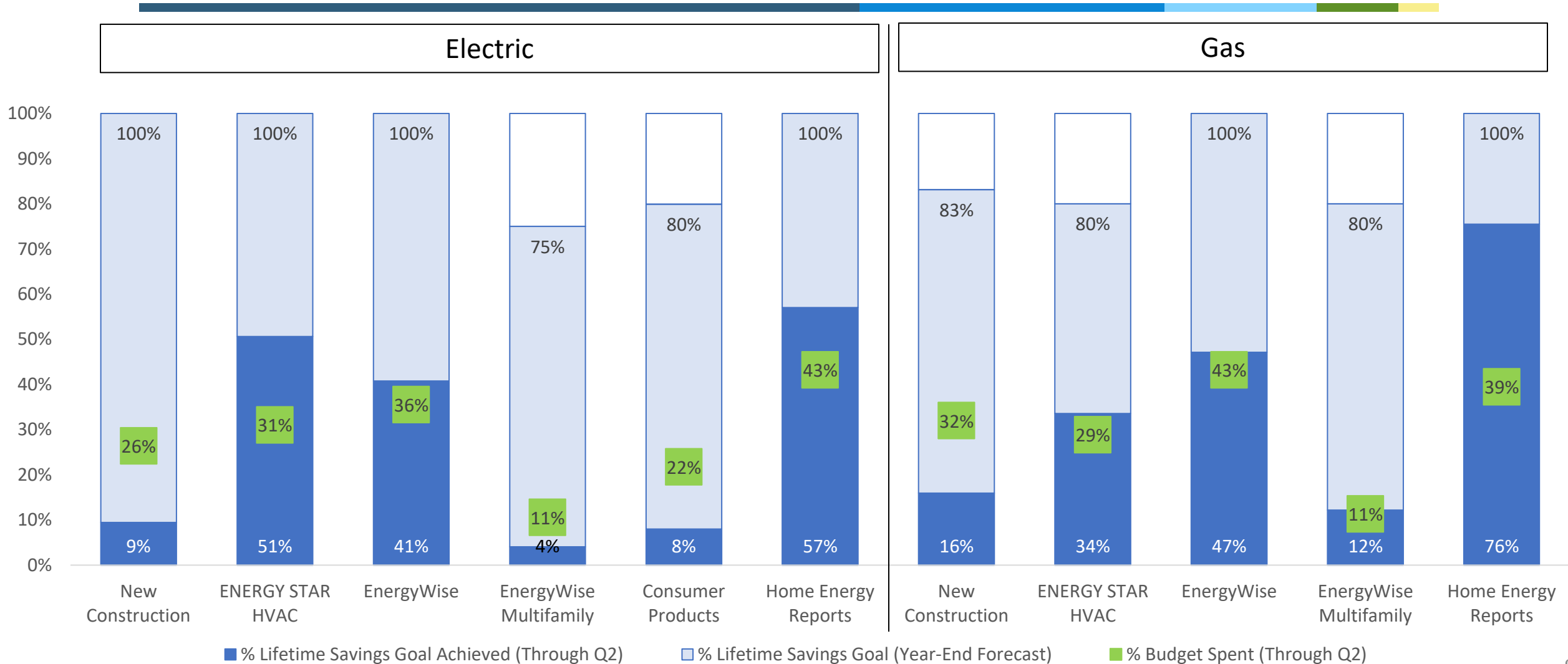
## Energy Related Trainings

- Commitment
  - In 2022, the Company will continue to provide energy-related trainings in collaboration with Quonset Development Corporation (QDC) to expand program participation.
- Update
  - QDC and RI Energy jointly hosted a hybrid in-virtual/in-person workshop at QDC headquarters. Approximately 20 customers participated in this event at which vendor partners presented on fuel cells and battery storage, and RI Energy discussed EE and ConnectedSolutions incentives that support these technologies.



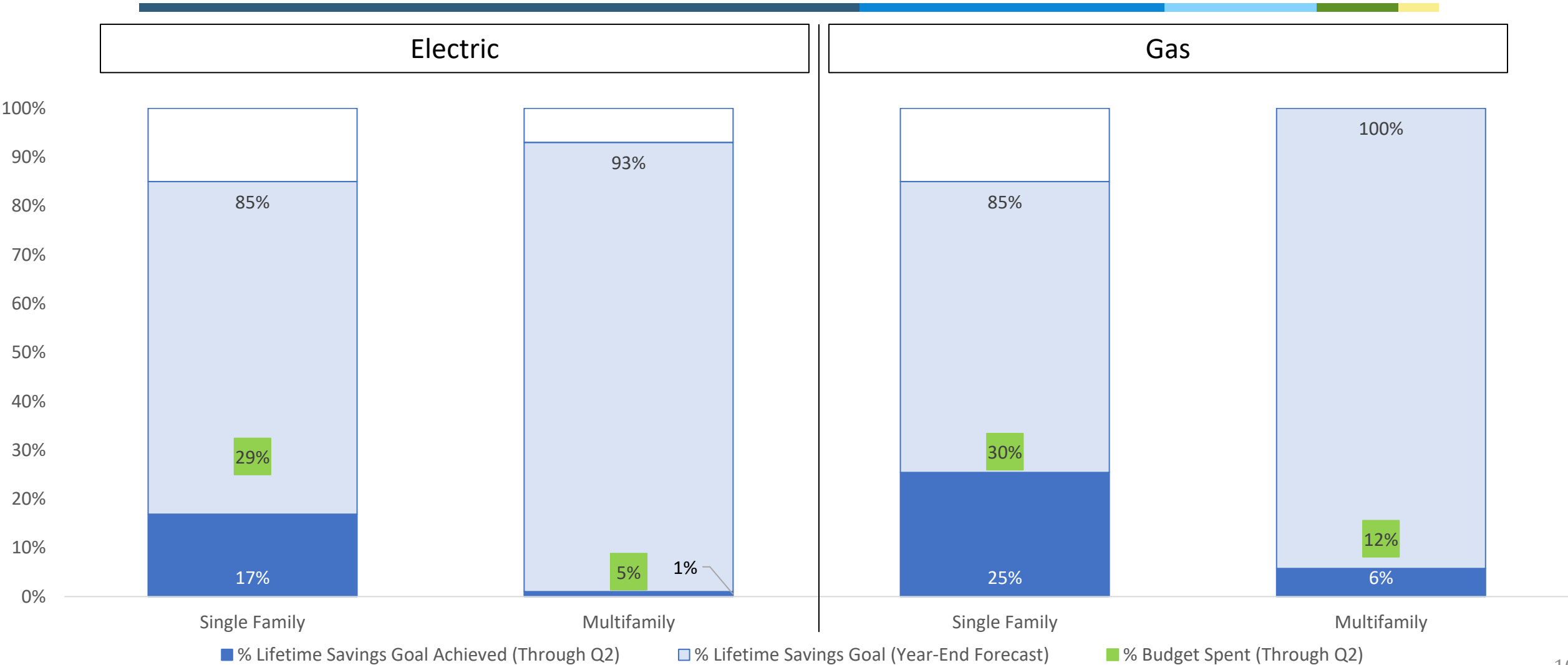


# Residential





# Income Eligible





# Select Residential 2022 Plan Commitments

## Income Eligible Workforce Development

- Commitment
  - Rebuild and stabilize the number of qualified AMP/weatherization and heating assessors. Due to workforce layoffs, furloughs, extended unemployment benefits, and workforce transition, the CAP Agencies' workforce was significantly impacted. The IES Program will prioritize assisting CAP's to train, hire and retrain assessors.
- Update
  - Five new assessors have been hired by CAP agencies since Q1
  - One CAP lost an assessor, but is in the process of interviewing and hiring for replacement

## Multifamily Property Case Studies

- Commitment
  - The Company will work with the lead vendor to identify customer(s) that may be interested in having a case study developed based on their experience as a participant in the Multifamily and/or Income Eligible Multifamily program.
  - The case study will be posted on the Company's website and infused into the program's 2022 marketing collateral as appropriate.
- Update
  - RISE Engineering has identified two customers to participate in the case studies
  - First case study is in final draft stage
  - RI Energy hoping to complete second by Q4



# RHODE ISLAND ENERGY EQUITY UPDATE



# Equity Reporting

2022 Q2 report included the following Equity Metrics:

- Contractor Demographic Update
  - 37 Independent Insulation Contractors
  - 9 Women or Minority Owned Businesses
- Renter/Landlord Activity
  - 13% Assessments
  - 10% Weatherization
- Low- and Moderate-Income information in English and Spanish



**Rhode Island Energy™**  
a PPL company

**Incentivos mejorados según el nivel de ingresos**

Gracias por dar el primer paso hacia la eficiencia energética con una Evaluación del consumo de la vivienda. Durante la evaluación, el especialista en energía le recomendó que implementara mejoras de climatización como la acción que más lo ayudará a ahorrar energía. Estas mejoras incluyen sellar las fugas de aire de su vivienda e instalar aislamiento.

Usar aislamiento y sellar las fugas de aire pueden ayudarlo a lo siguiente:

- Ahorrar dinero y energía
- Reducir la presencia de alérgenos y el ruido exterior
- Aumentar la comodidad de la vivienda todo el año

En colaboración con la Rhode Island Office of Energy Resources (Secretaría de Recursos Energéticos de Rhode Island), Rhode Island Energy desea ayudarle a maximizar la comodidad y el ahorro energético. Para ello, ofrece un incentivo mejorado del 100 % del aislamiento aprobado, a clientes que cumplen con los requisitos.

Para aprovechar esta oferta disponible por tiempo limitado del incentivo del 100 %, hasta \$15,000, deberá seguir los siguientes pasos:

1. Revise las pautas de elegibilidad en virtud de los ingresos para asegurarse de que cumple con los requisitos:

Número de personas en el grupo familiar	Ingresos familiares brutos anuales	Tamaño del grupo familiar	Ingresos familiares brutos anuales
1 persona	De \$19,448 a \$44,960	1 persona	De \$17,949 a \$114,454
2 personas	De \$43,998 a \$58,663	8 personas	De \$85,290 a \$119,052
3 personas	De \$54,931 a \$72,487	10 personas	De \$97,431 a \$121,640
4 personas	De \$64,905 a \$86,269	10 personas	De \$93,172 a \$124,223
5 personas	De \$75,055 a \$100,072	11 personas	De \$95,119 a \$126,815
6 personas	De \$85,408 a \$113,876	12 personas	De \$97,054 a \$129,404

2. Si cree que cumple con las pautas mencionadas, complete el formulario de autocertificación que le entregó su especialista en energía.
3. Si se aprueba su participación, RISE Engineering (el proveedor que realizó la evaluación) le brindará un acuerdo actualizado en el que se incluye esta promoción por tiempo limitado.

Esperamos ayudarlo a ahorrar energía. Si tiene alguna pregunta o le gustaría controlar el estado de su solicitud, comuníquese con RISE Engineering al 1-401-764-3700.

**RISE ENGINEERING** **OFFICE OF ENERGY RESOURCES**

Tenga en cuenta que esta oferta especial solo es válida para la propiedad donde se realizó la evaluación del consumo de la vivienda. RISE Engineering es un proveedor independiente de servicios de eficiencia energética para el programa Energy Wise de Rhode Island Energy. Este programa se financia con el cargo para la eficiencia energética que se cobra en las facturas de gas y electricidad a todos los clientes conforme a la legislación de Rhode Island.

**Income-Based Enhanced Incentives**

Thank you for taking the first step toward saving energy with a Home Energy Assessment. During the assessment, your Energy Specialist recommended weatherization upgrades as your key energy-saving improvement. Weatherization includes sealing air leaks around your home and adding insulation.

Insulation and air sealing can help you:

- Save energy and money
- Reduce allergens and outside noise
- Increase home comfort year-round

In partnership with the Rhode Island Office of Energy Resources, Rhode Island Energy wants to help you maximize your comfort and energy savings by offering an enhanced incentive of 100% of approved insulation to qualifying customers.

To take advantage of this limited time offer of a 100% incentive, up to \$15,000:

1. Review the income eligibility guidelines to make sure you qualify:

Household Size	Pre-Tax Annual Household Income	Household Size	Pre-Tax Annual Household Income
1 person	\$19,448 - \$44,960	7 people	\$29,249 - \$114,454
2 people	\$43,998 - \$58,663	8 people	\$85,290 - \$119,052
3 people	\$54,931 - \$72,487	9 people	\$97,431 - \$121,640
4 people	\$64,905 - \$86,269	10 people	\$93,172 - \$124,223
5 people	\$75,055 - \$100,072	11 people	\$95,119 - \$126,815
6 people	\$85,408 - \$113,876	12 people	\$97,054 - \$129,404

2. If you believe you meet the guidelines above, complete the self-attestation form provided by your Energy Specialist.
3. If approved, RISE Engineering (the vendor who performed your assessment) will provide you with an updated contract reflecting this limited time promotion.

We look forward to helping you save energy. If you have any questions or would like to check the status of your application, please contact RISE Engineering at 1-401-764-3700.

**RISE ENGINEERING** **OFFICE OF ENERGY RESOURCES**

Please note, this special offer is only valid for the property where the home energy assessment was conducted. RISE Engineering is an independent provider of energy efficiency services for Rhode Island Energy's Energy Wise Program. These programs are funded by the energy-efficiency charge on all customer gas and electric bills, in accordance with Rhode Island law.

# Equity Reporting

## 2022 Equity Working Group Commitments

<b>Commitments</b>	<b>21</b>
Completed	14
Ongoing	3
In Development	2
Moved to 2023	1
Will not proceed	1

- Moved - Multi-cultural energy efficiency campaign
- Will not proceed – Inclusion of EE materials in water bills



# CONSULTANT TEAM EQUITY UPDATE





# Overarching Comments

Some cases where continuation of pre-existing activity is characterized as a 2022 commitment

Excludes determination of success for each commitment, as defined in 2022 Plan, impeding assessment of actions and impact

Many commitment updates lack sufficient detail and/or data to support claims of completeness





# Assessment of Status Updates

Status	Definition	Count
Complete	Update included in Q2 report meets determination of success as outlined in 2022 Plan and/or provides sufficient supporting evidence to give the reader a clear understanding of what action(s) the Company has taken.	0
On Track	Update included in Q2 report provides sufficient supporting evidence to demonstrate that progress has been made and that commitment will be completed by the end of 2022.	1
Cannot be Assessed	Update included in Q2 report provides insufficient supporting evidence to allow for assessment of commitment status.	13
Not on Track	Update included in Q2 report indicates that the commitment is unlikely to be completed in 2022.	5
Omitted	Some items listed as 2022 Commitments in Q2 report were just the current activity that the Company included in the 2022 Plan. Since these do not represent enhancements that address the Equity Working Group's recommendations, we have tagged these as "Omitted".	2



# Cannot be Assessed – An Example

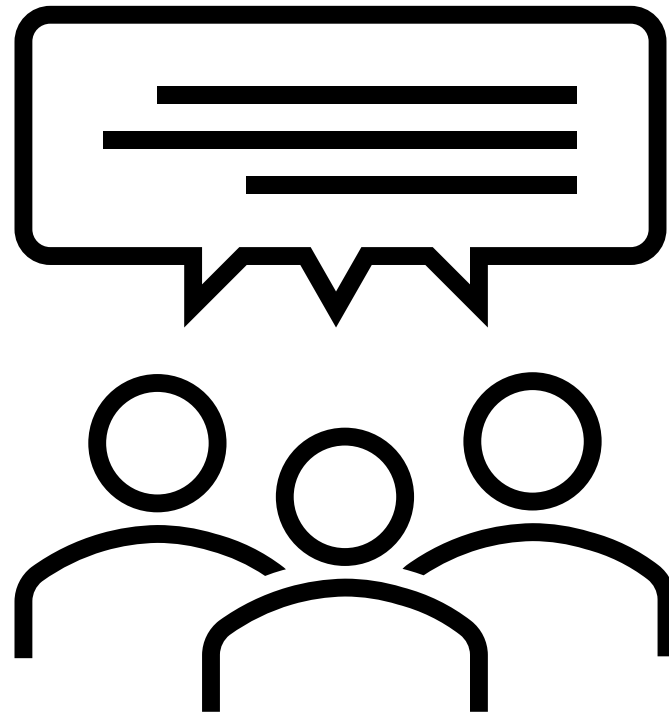
2. Hire multilingual staff and partner with trusted leaders who have the same ethnic background and that frequent popular community gathering places such as community centers and faith-based organizations.		
Current Activity	The Company has three (3) Customer Advocates with multi-lingual capacity who provide one-on-one individual assistance to customers through community-based efforts.	
2022 Commitments and Status	1. Provide additional energy efficiency program training to the Company's existing Customer Advocates so they can more effectively speak to the benefits of the programs.	In Progress- some training has been provided to the existing consumer advocates and will continue.
	2. Hire an additional Customer Advocate that will focus on promoting the energy efficiency programs. The new Customer Advocate will have community organizing experience and will be multi-lingual. The Advocate will deliver energy efficiency program information at community centers, faith-based organizations, multi-family housing, and other community gathering places. The Customer Advocate will leverage the expertise of existing community organizations that serve diverse households. The new hire will occur by mid-2022 before summer events begin.	Completed- new hire effective May 2022 currently being trained.
Determination of Success	<ol style="list-style-type: none"> <li>1. The completion of additional energy efficiency training for the Company's existing Customer Advocates.</li> <li>2. The hire of a new Customer Advocate that will focus on energy efficiency.</li> <li>3. The number of events the new Customer Advocate hosts/attends.</li> <li>4. The number of customers reached at these events.</li> <li>5. The number of customers that sign up for a home energy assessment or an additional program related action as a direct result of the new Customer Advocate's community-based outreach efforts.</li> </ol>	

Commitment 2.2 marked as complete with insufficient detail about the new Customer Advocate

Determination of success requires several other milestones beyond hiring the Customer Advocate, and these are not included in the report



# Council Member Discussion





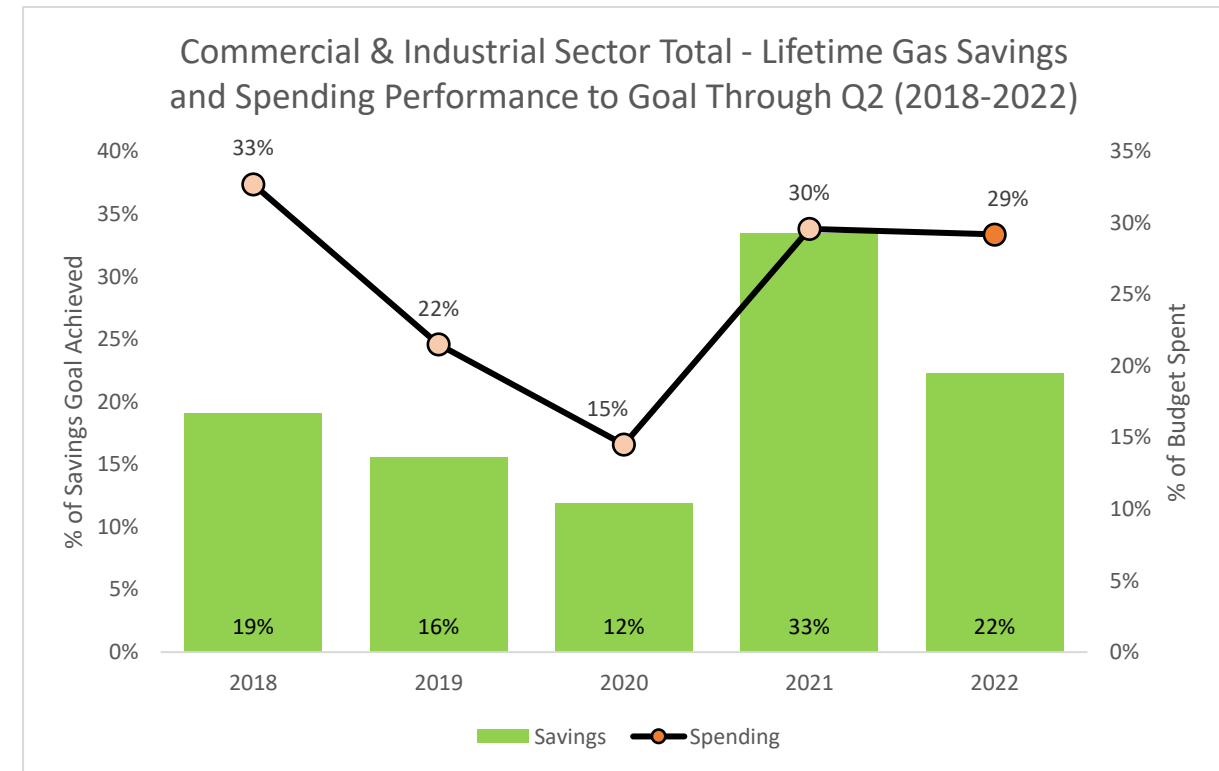
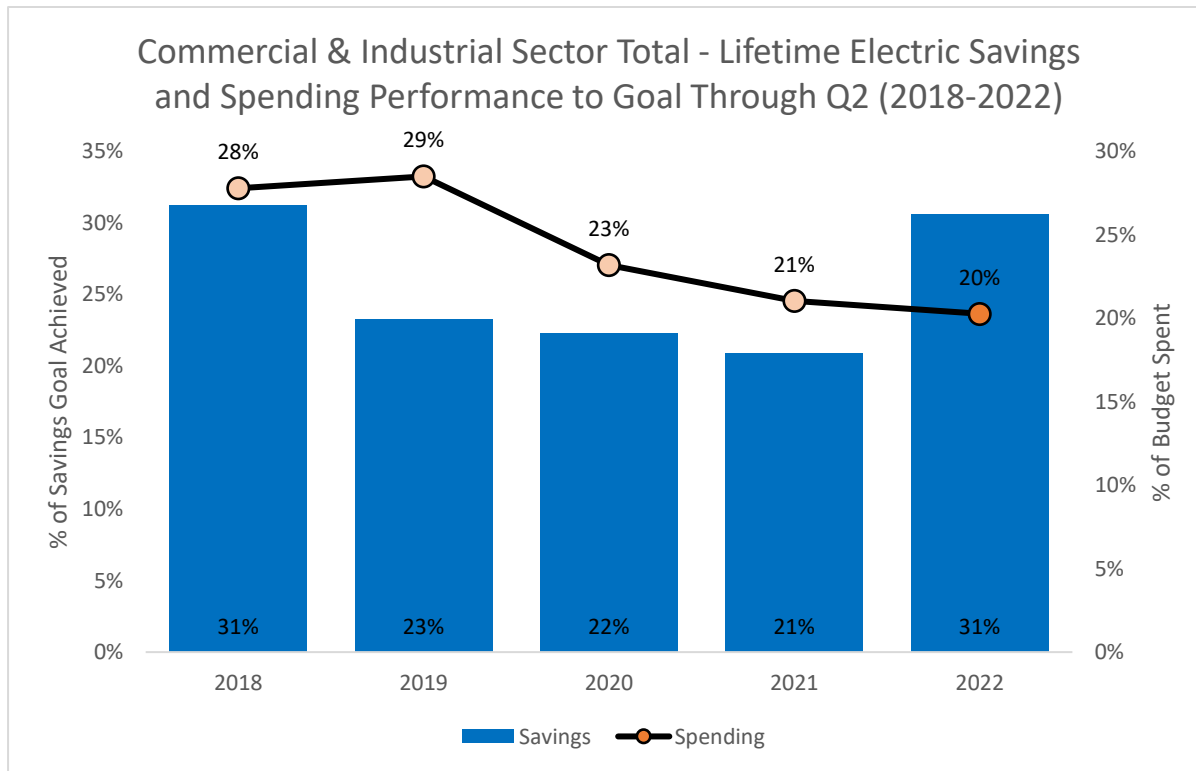
# Appendix





# Commercial & Industrial Updates

C&I program performance tracking well with prior years for both electric and gas programs, except for electric New Construction



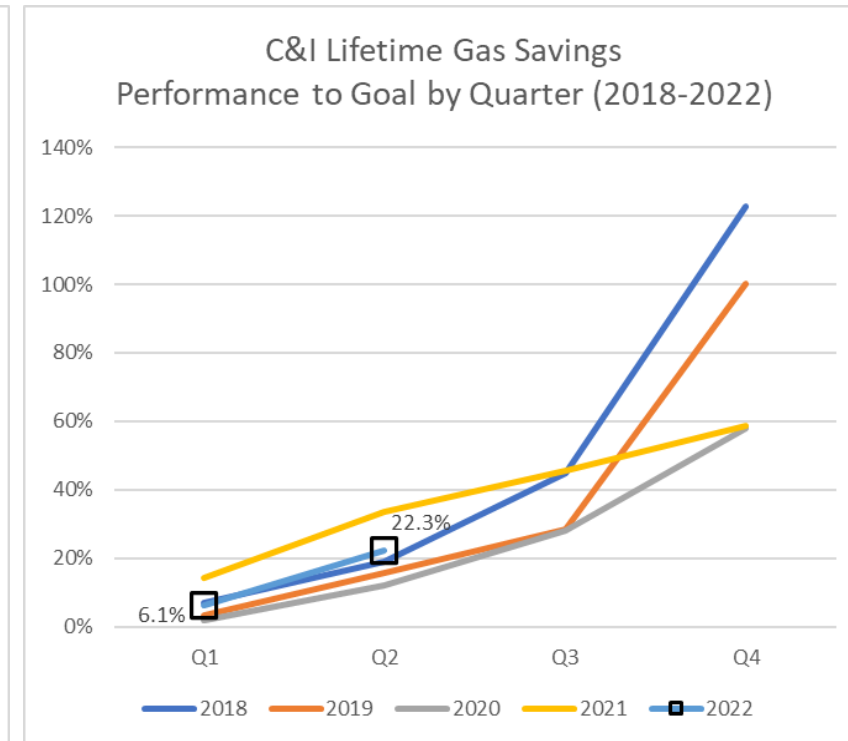
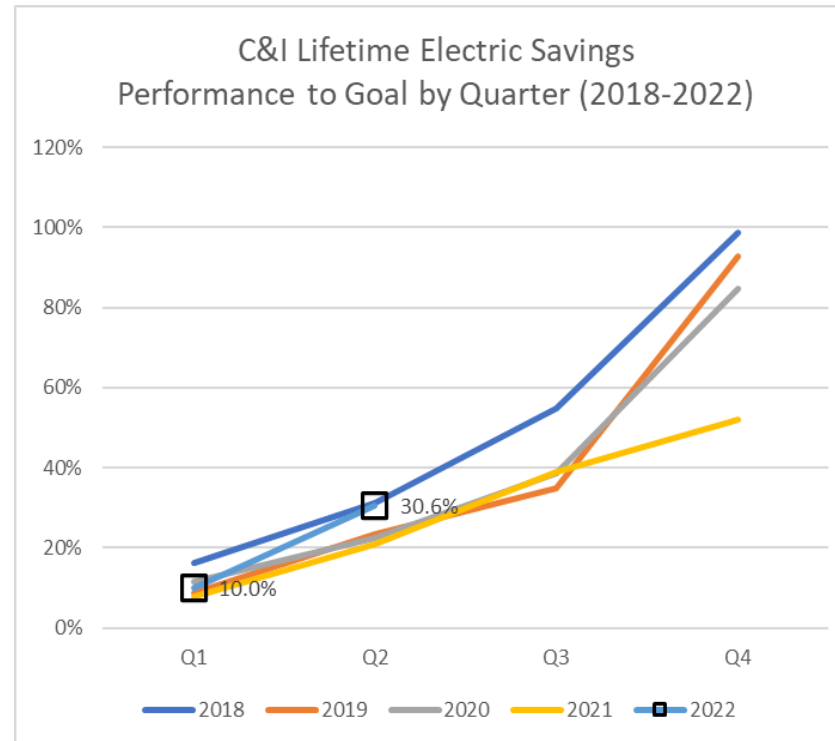


# Commercial & Industrial Updates

Forecasted underperformance for the electric/gas New Construction and electric Retrofit programs. “Hockey stick” effect may be mitigated by project delays

Electric Program	Achieved Savings	Achieved Spending	Savings Forecast	Spending Forecast
<b>New Construction</b>	<b>17.8%</b>	<b>16.8%</b>	<b>35.7%</b>	<b>51.3%</b>
<b>Retrofit</b>	<b>31.0%</b>	<b>17.9%</b>	<b>98.7%</b>	<b>89.2%</b>
Small Business	67.1%	30.6%	136.7%	100.0%

Gas Program	Achieved Savings	Achieved Spending	Savings Forecast	Spending Forecast
<b>New Construction</b>	<b>24.5%</b>	<b>32.0%</b>	<b>98.3%</b>	<b>73.6%</b>
Retrofit	20.1%	28.8%	96.1%	103.9%
Small Business	52.6%	67.1%	103.6%	100.0%
<b>C&amp;I Multifamily</b>	<b>9.4%</b>	<b>10.7%</b>	<b>80.0%</b>	<b>80.0%</b>

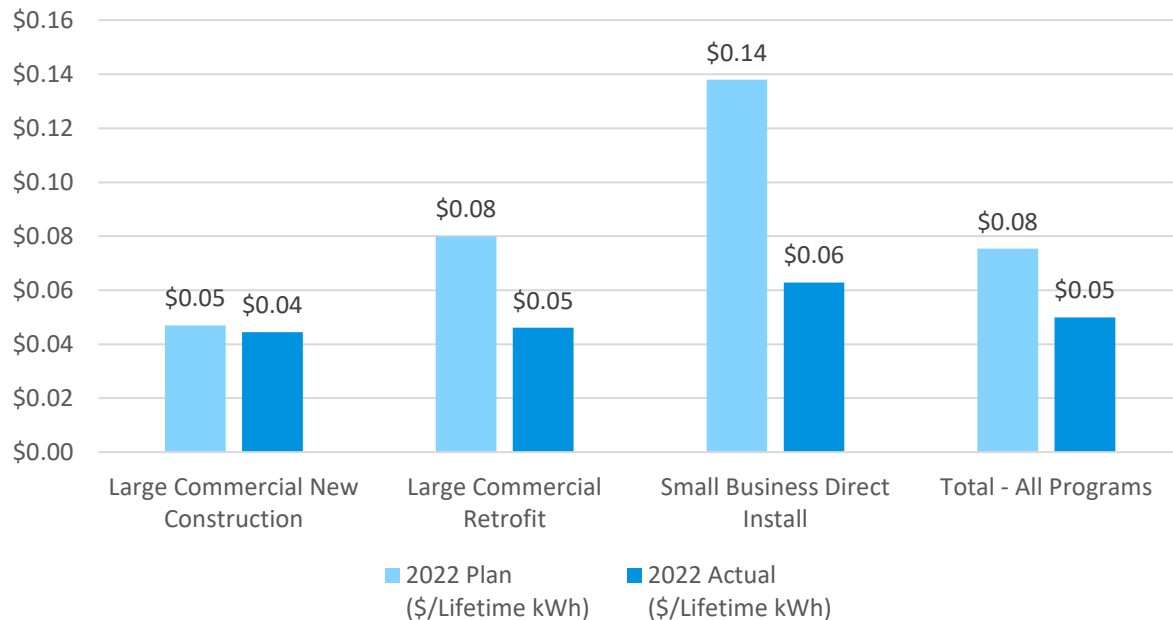




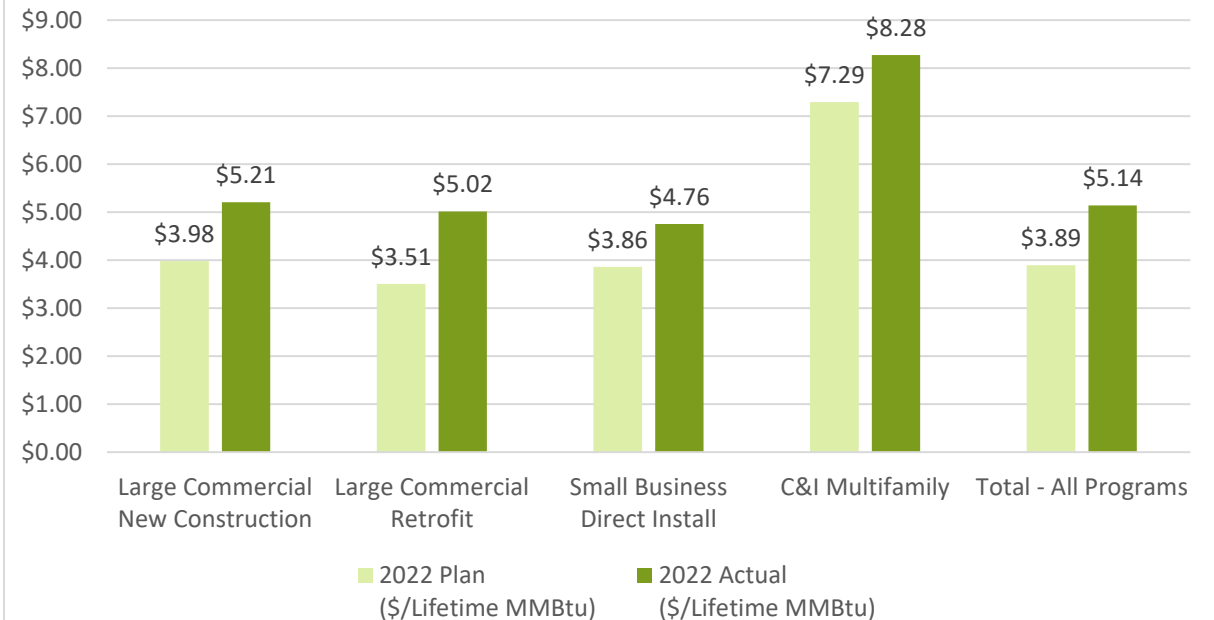
# Commercial & Industrial Updates

Actual cost-to-achieve lower for electric portfolio, but higher for gas. Forecasted underspending may warrant increased focus on programs performing well.

Electric Cost to Achieve - Plan vs. Actual  
(\$/Lifetime kWh)



Gas Cost to Achieve - Plan vs. Actual  
(\$/Lifetime MMBtu)

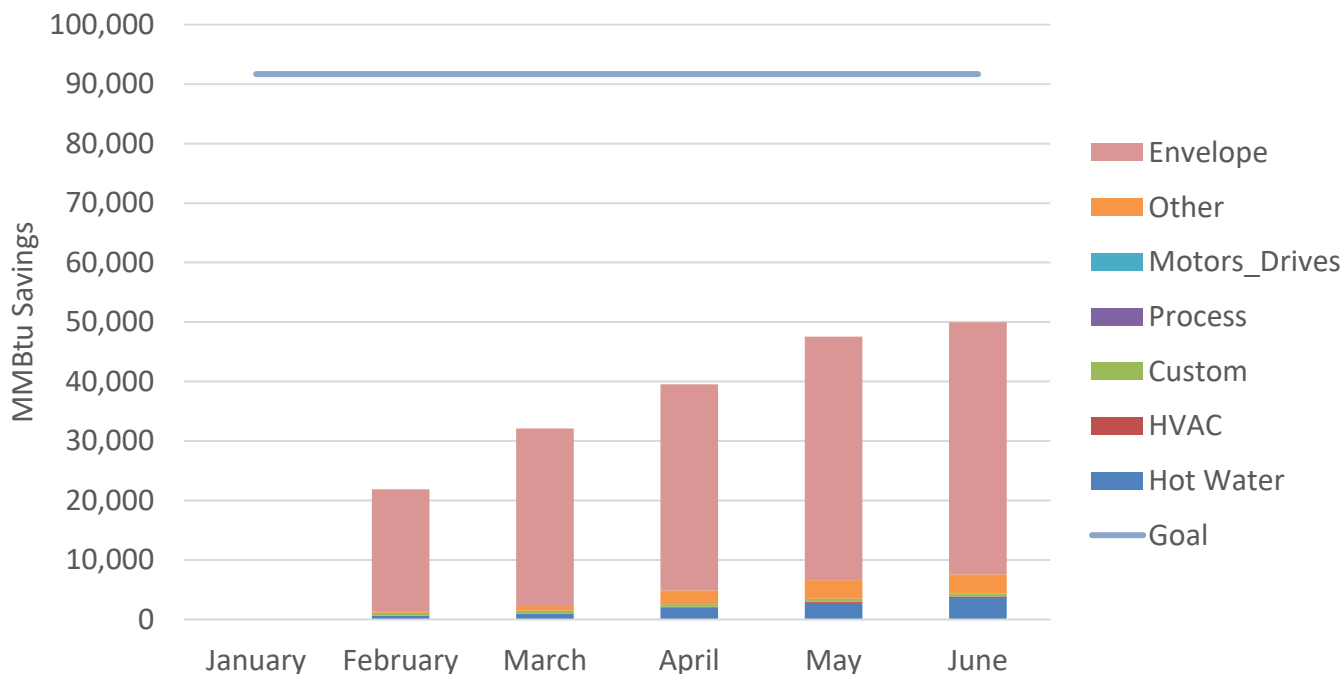




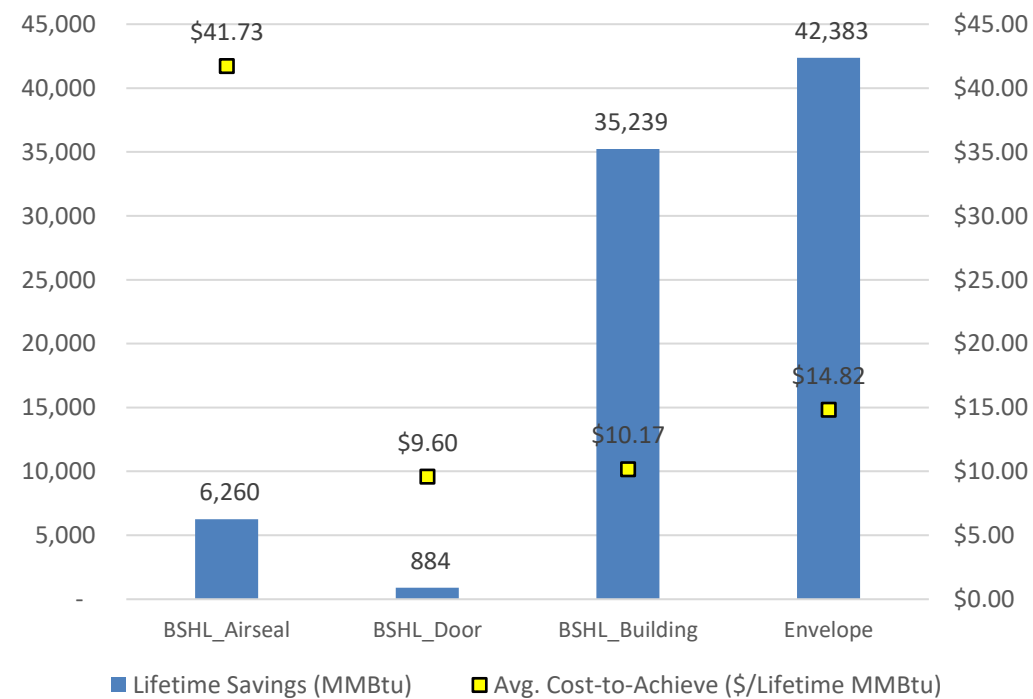
# Commercial & Industrial Updates

Envelope measures responsible for 85% of Small Business lifetime gas savings. Good area of investment, especially in advance of winter season

Cumulative Lifetime Gas Savings by End Use  
Small Business



Lifetime Savings and Cost-to-Achieve (\$/MMBtu)  
Small Business Envelope Measures

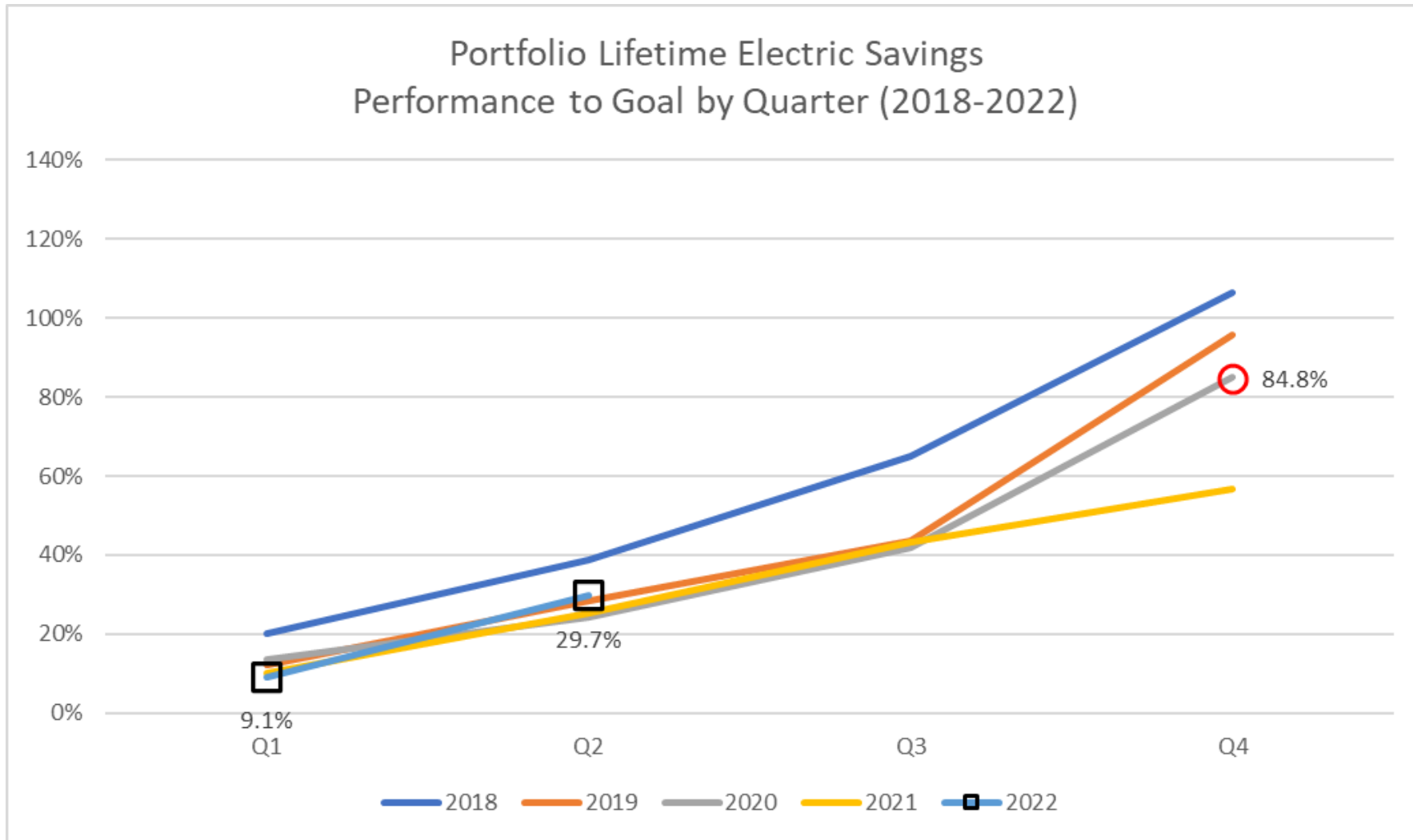






Year-End Forecast	
Lifetime Savings	84.8%
Spending	90.8%

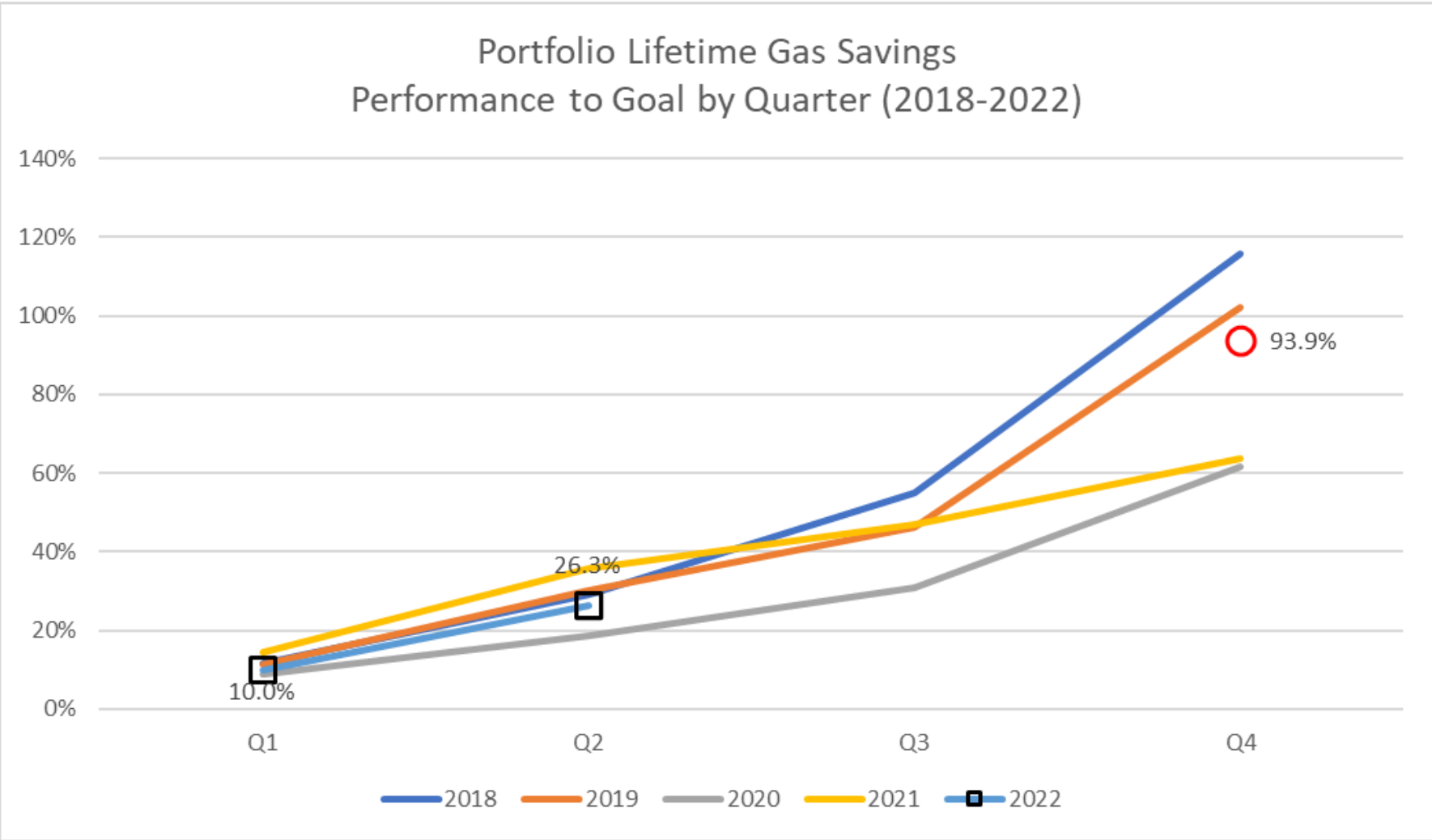
# Electric Portfolio Forecast





Year-End Forecast	
Lifetime Savings	93.9%
Spending	94.4%

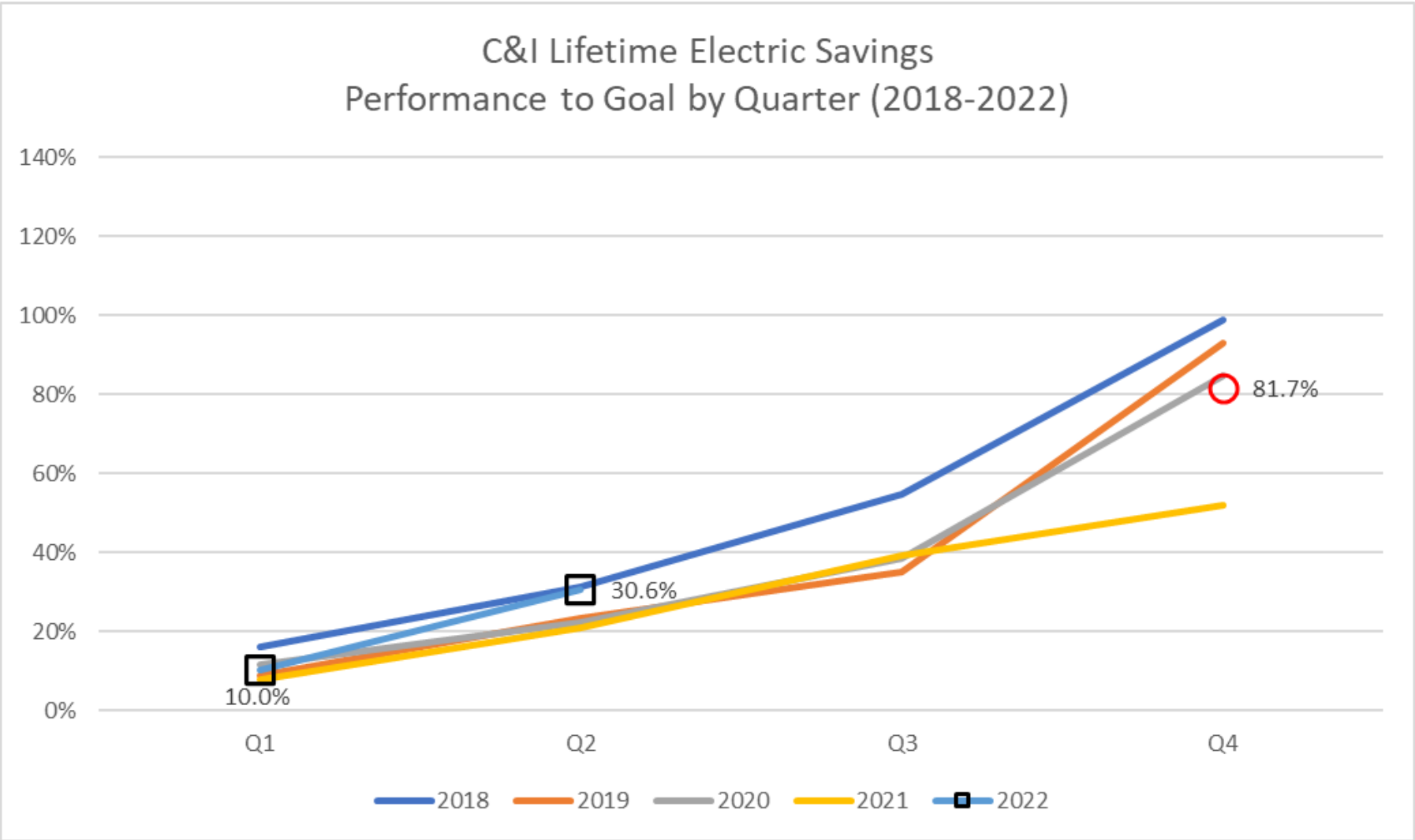
# Gas Portfolio Forecast





Year-End Forecast	
Lifetime Savings	81.7%
Spending	85.7%

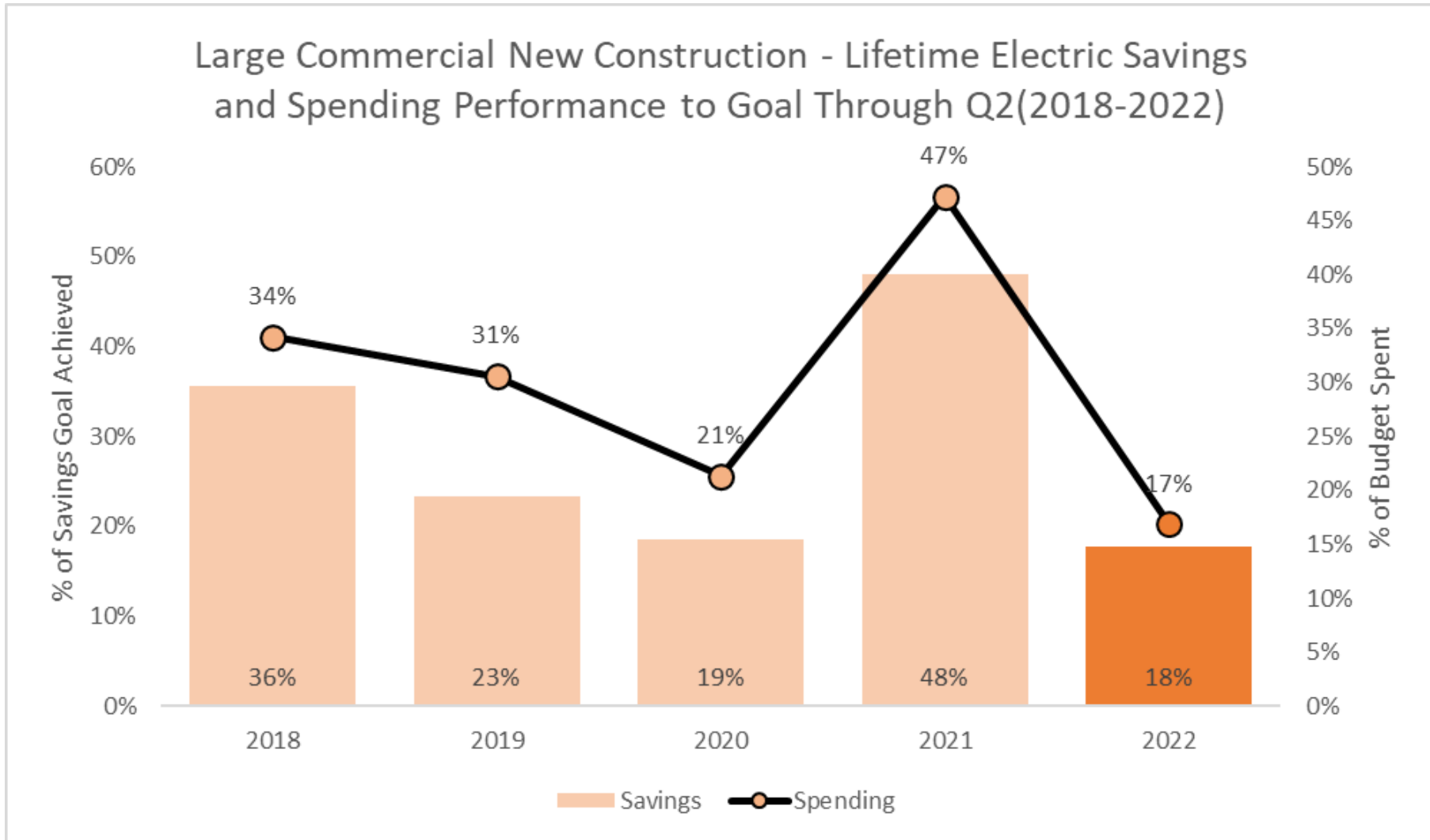
# Electric C&I Forecast





Year-End Forecast	
Lifetime Savings	35.7%
Spending	51.3%

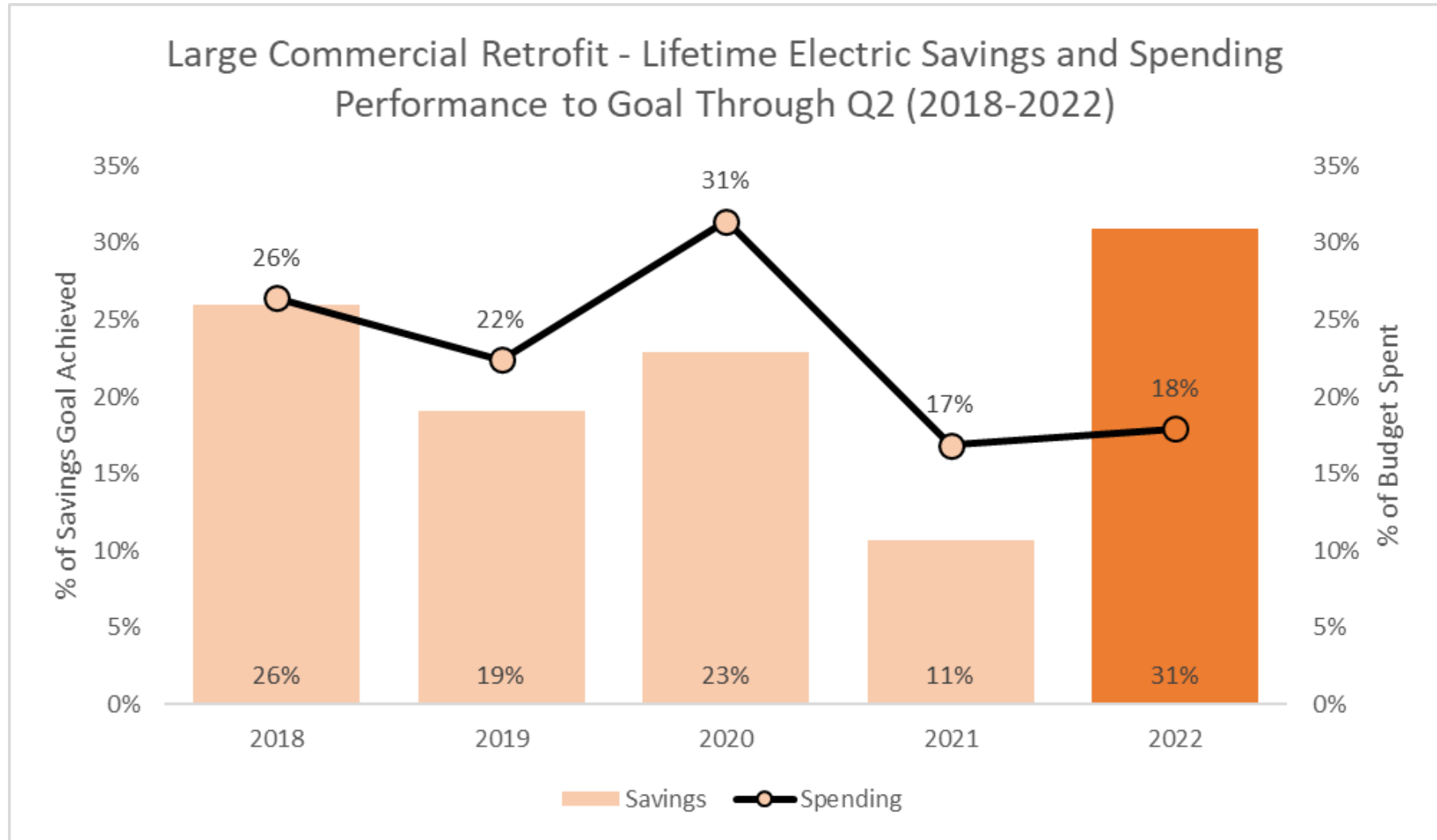
# Electric C&I Programs





Year-End Forecast	
Lifetime Savings	98.7%
Spending	89.2%

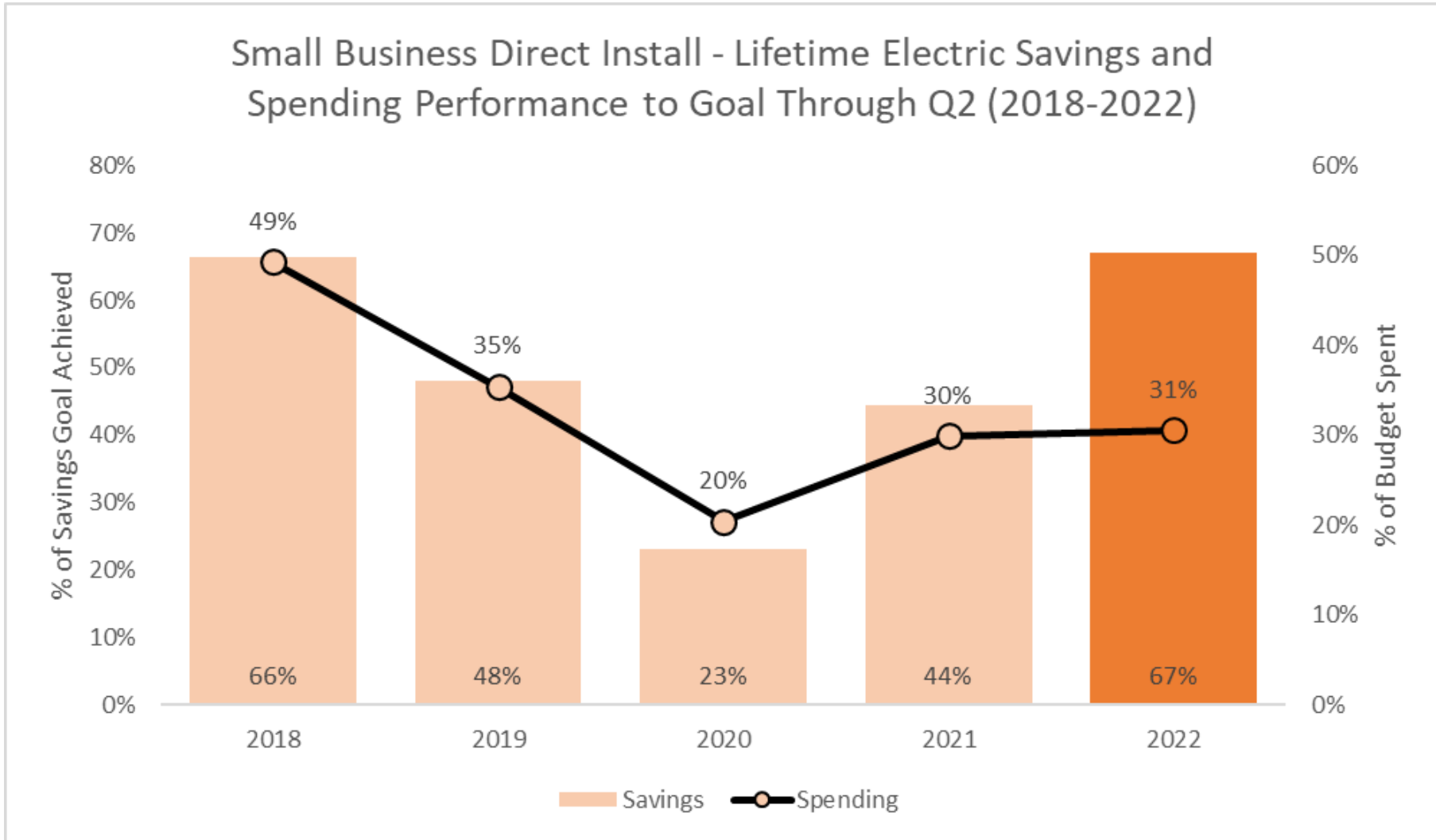
# Electric C&I Programs





Year-End Forecast	
Lifetime Savings	136.7%
Spending	100.0%

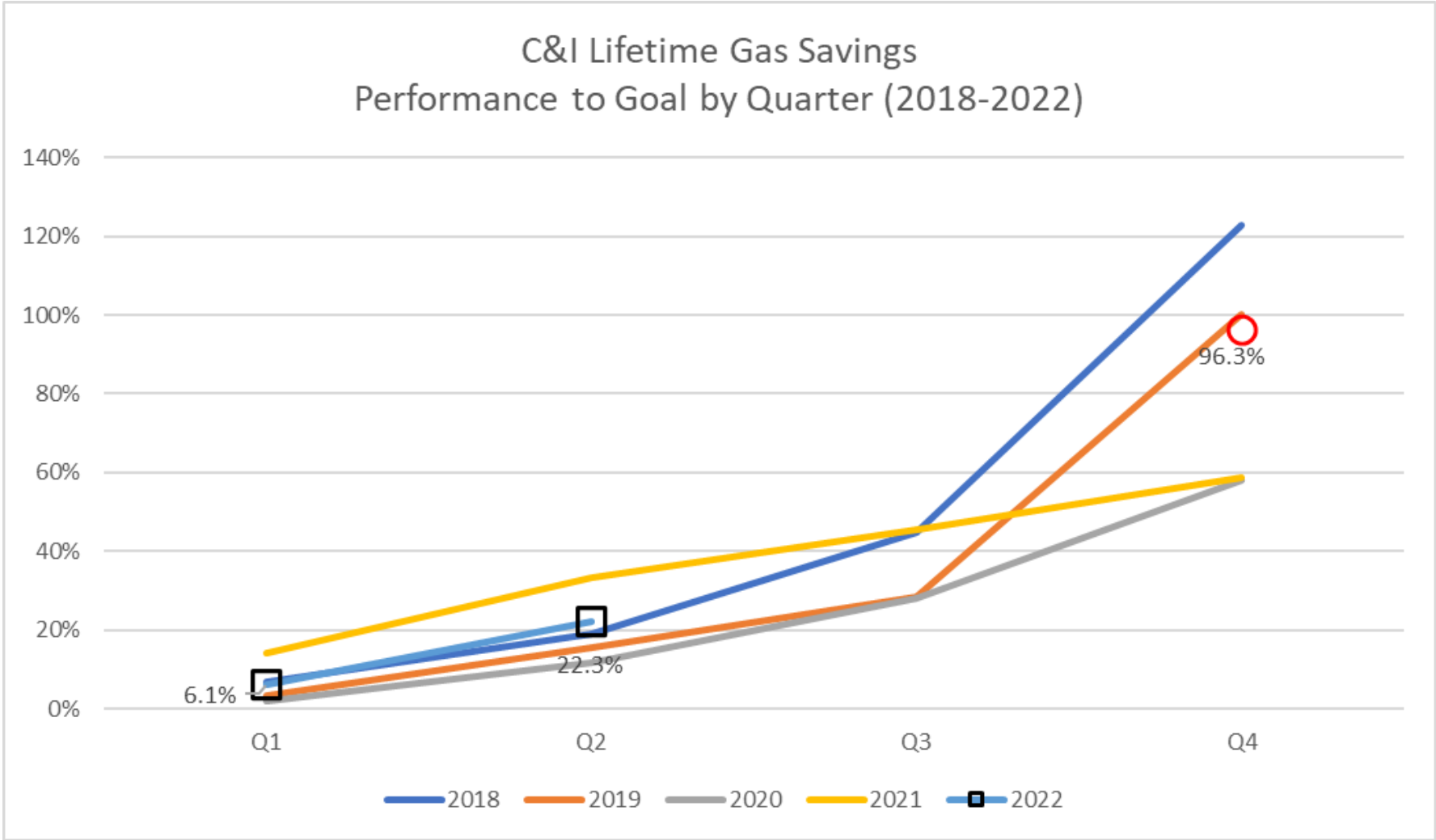
# Electric C&I Programs





Year-End Forecast	
Lifetime Savings	96.3%
Spending	91.1%

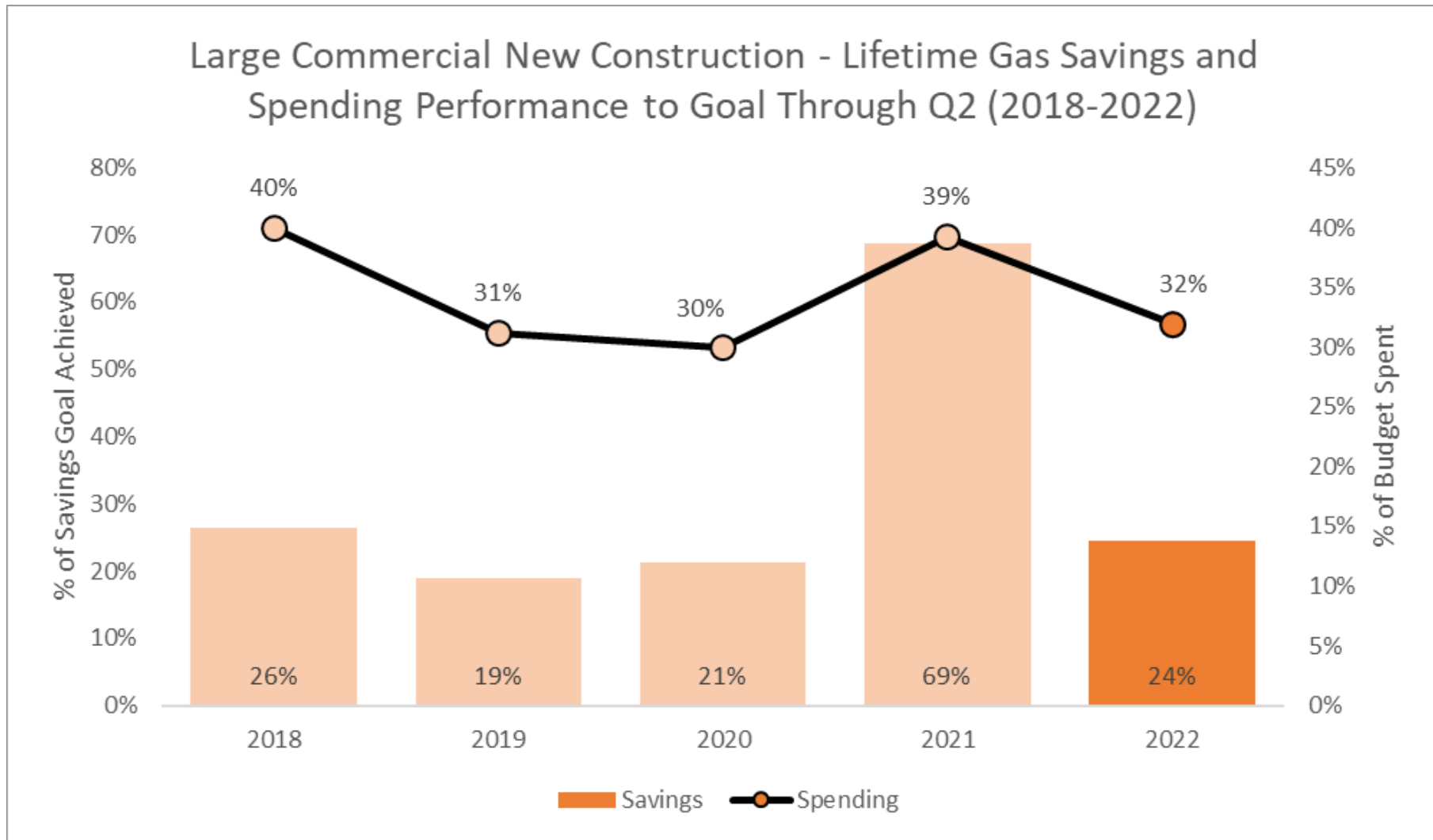
# Gas C&I Forecast





Year-End Forecast	
Lifetime Savings	98.3%
Spending	73.6%

# Gas C&I Programs

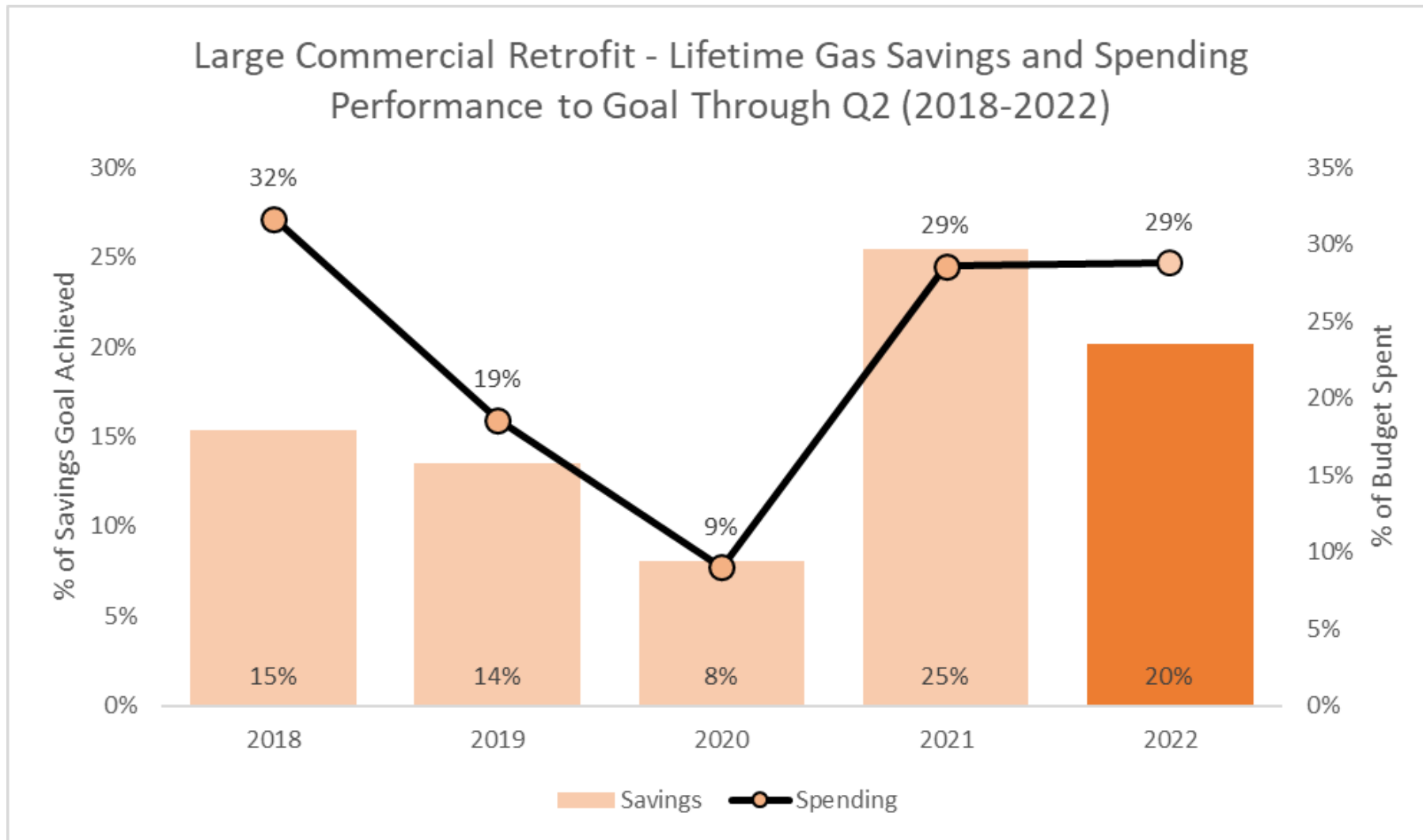






Year-End Forecast	
Lifetime Savings	96.1%
Spending	103.9%

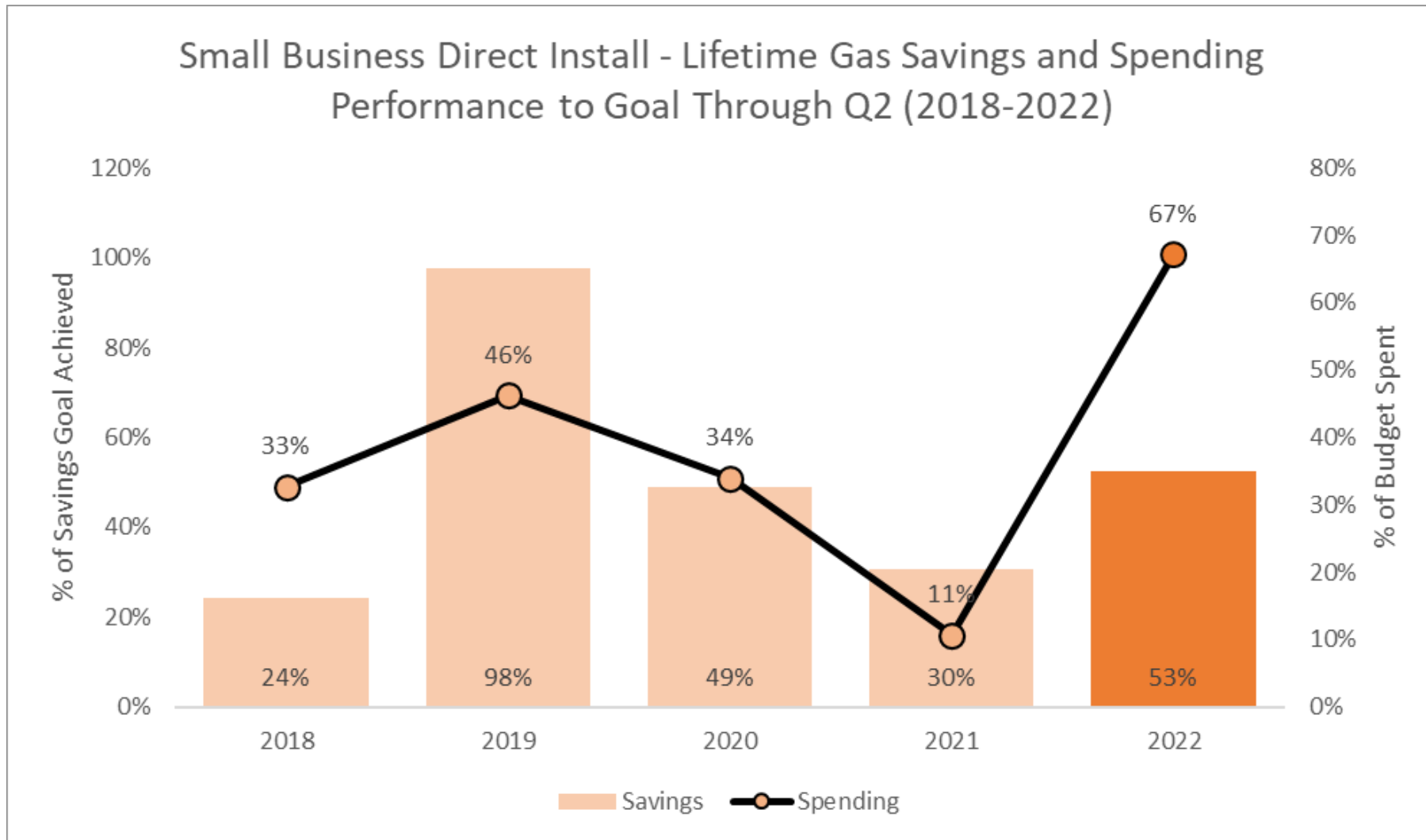
# Gas C&I Programs





Year-End Forecast	
Lifetime Savings	103.6%
Spending	100.0%

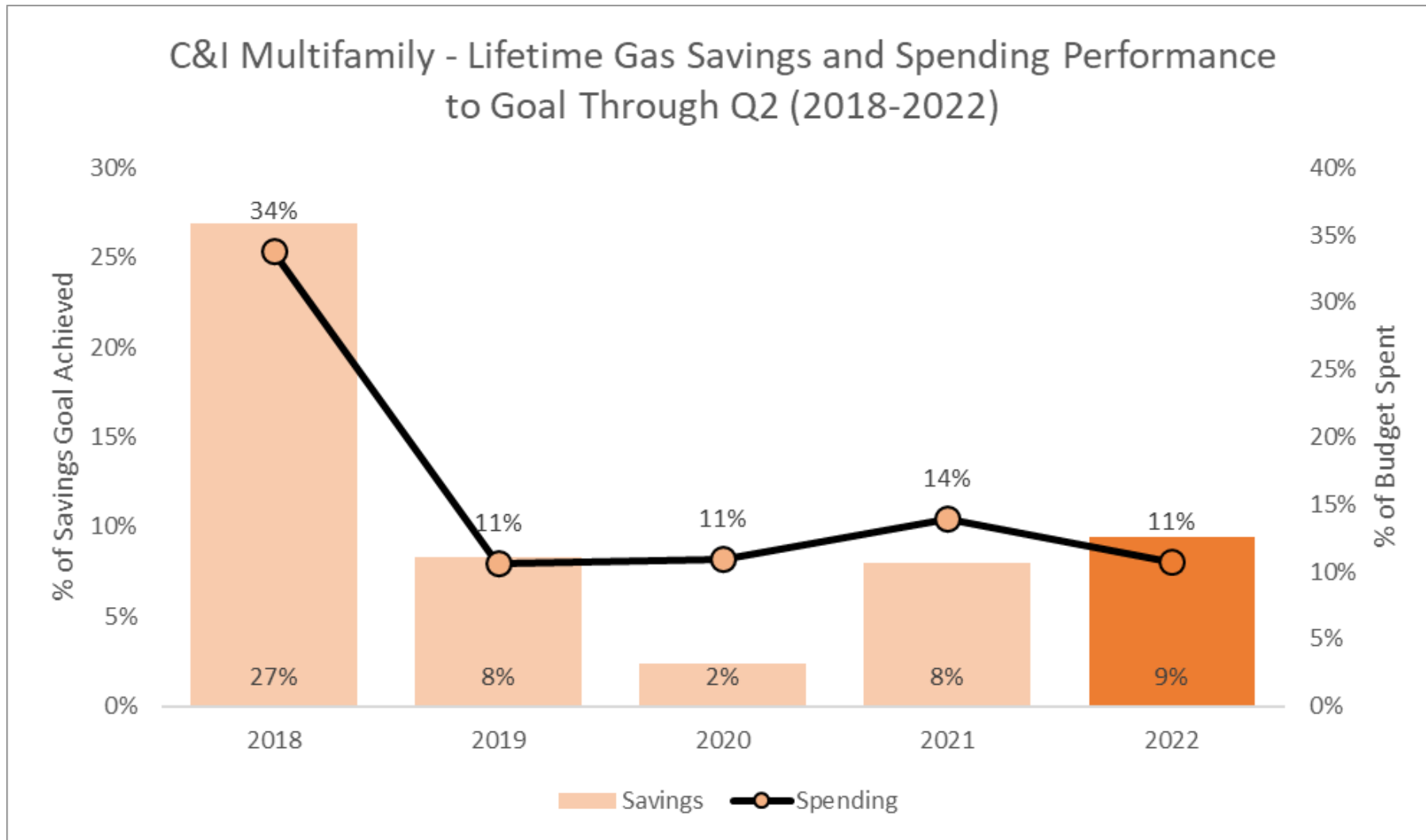
# Gas C&I Programs





Year-End Forecast	
Lifetime Savings	80.0%
Spending	80.0%

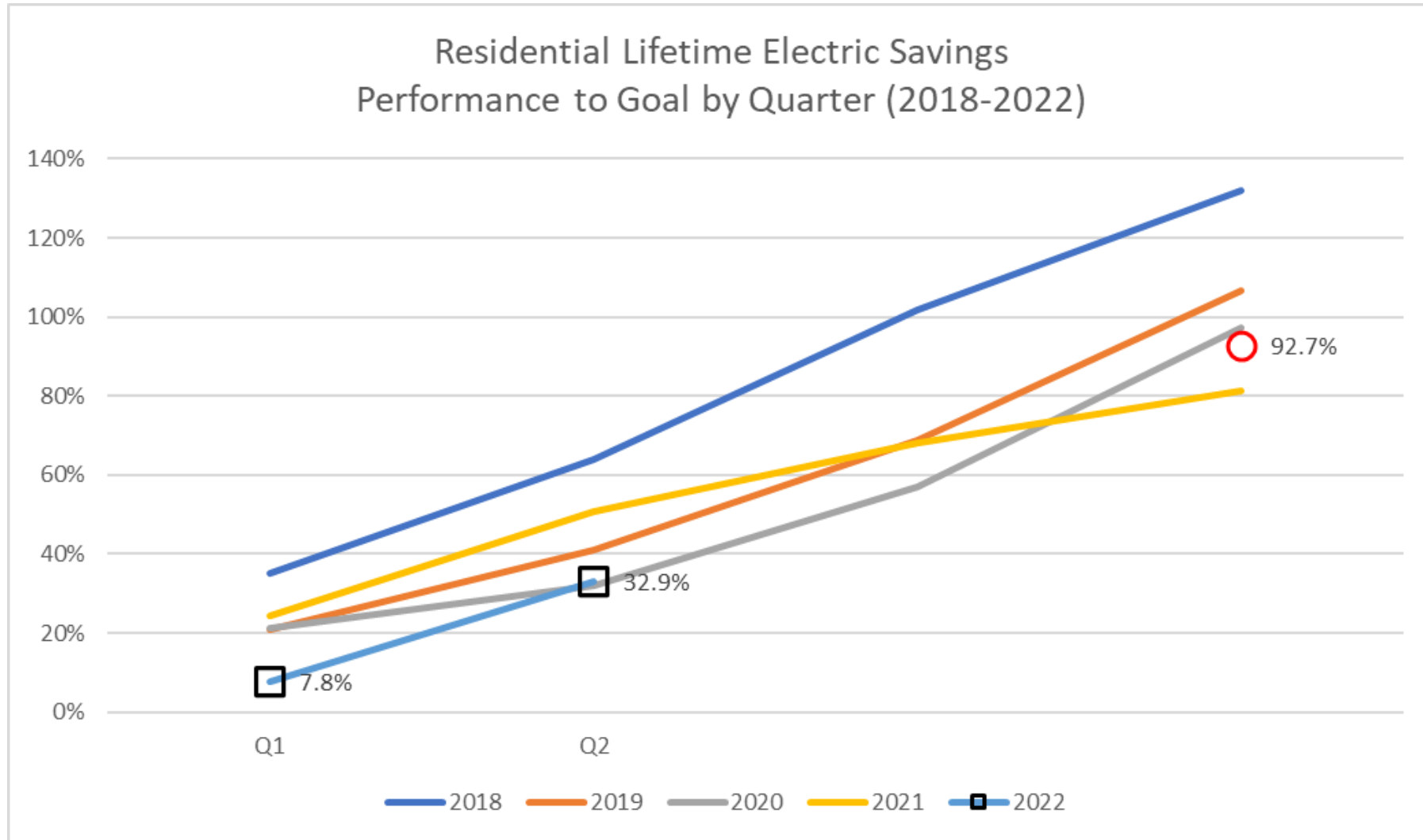
# Gas C&I Programs





Year-End Forecast	
Lifetime Savings	92.7%
Spending	96.9%

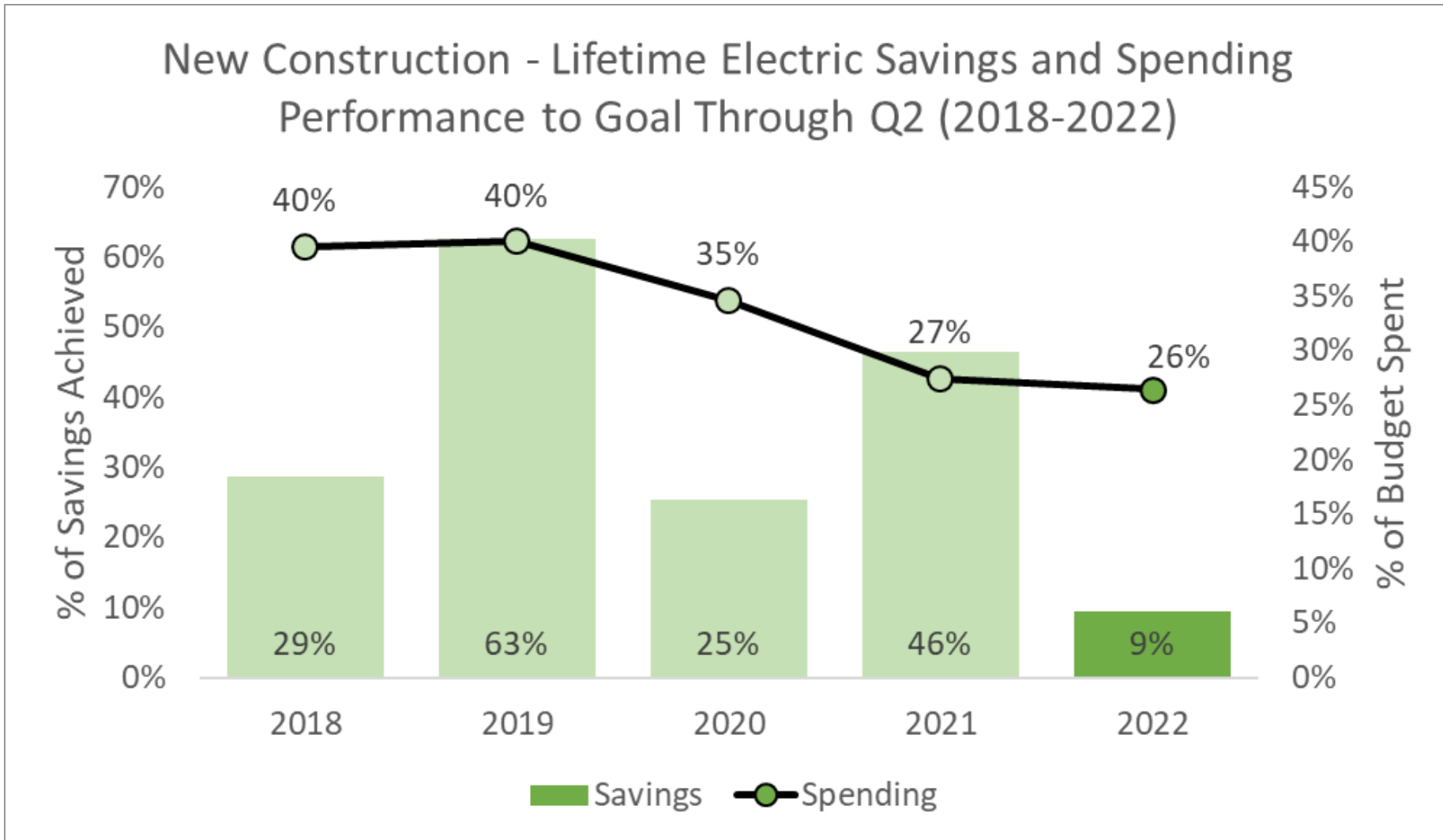
# Electric Res Forecast





Year-End Forecast	
Lifetime Savings	100.0%
Spending	101.5%

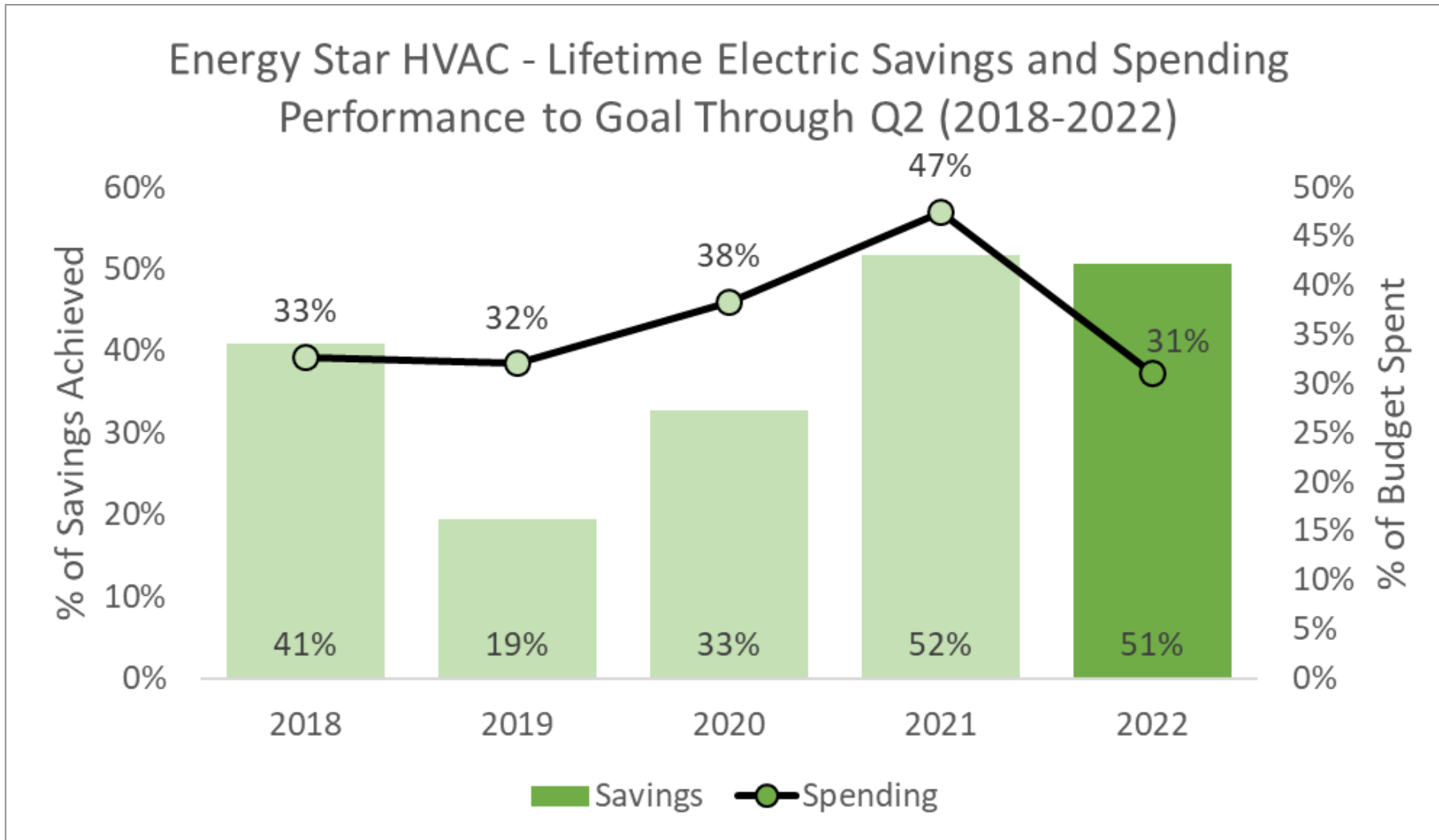
# Electric Res Programs





Year-End Forecast	
Lifetime Savings	100.0%
Spending	100.0%

# Electric Res Programs

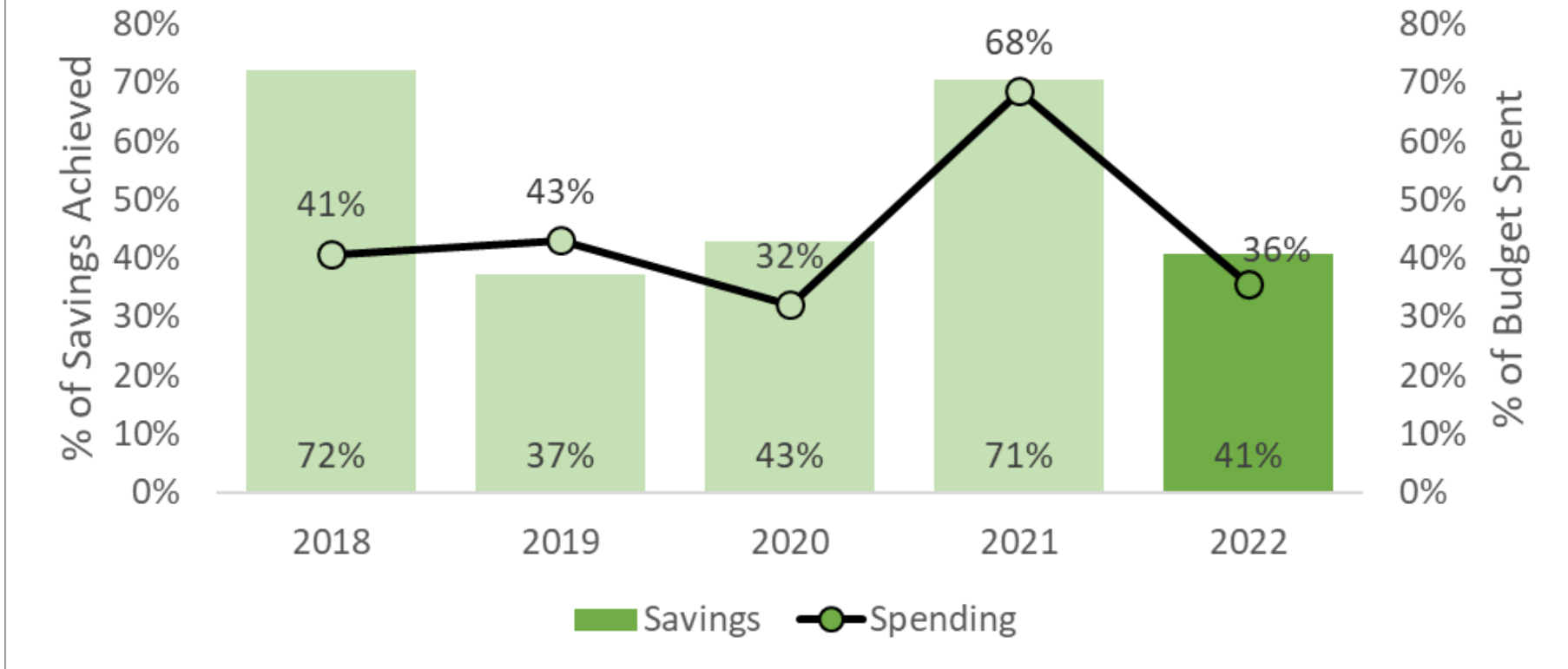




Year-End Forecast	
Lifetime Savings	100.0%
Spending	100.0%

# Electric Res Programs

EnergyWise Single Family (1-4 Units) - Lifetime Electric Savings and Spending Performance to Goal Through Q2 (2018-2022)

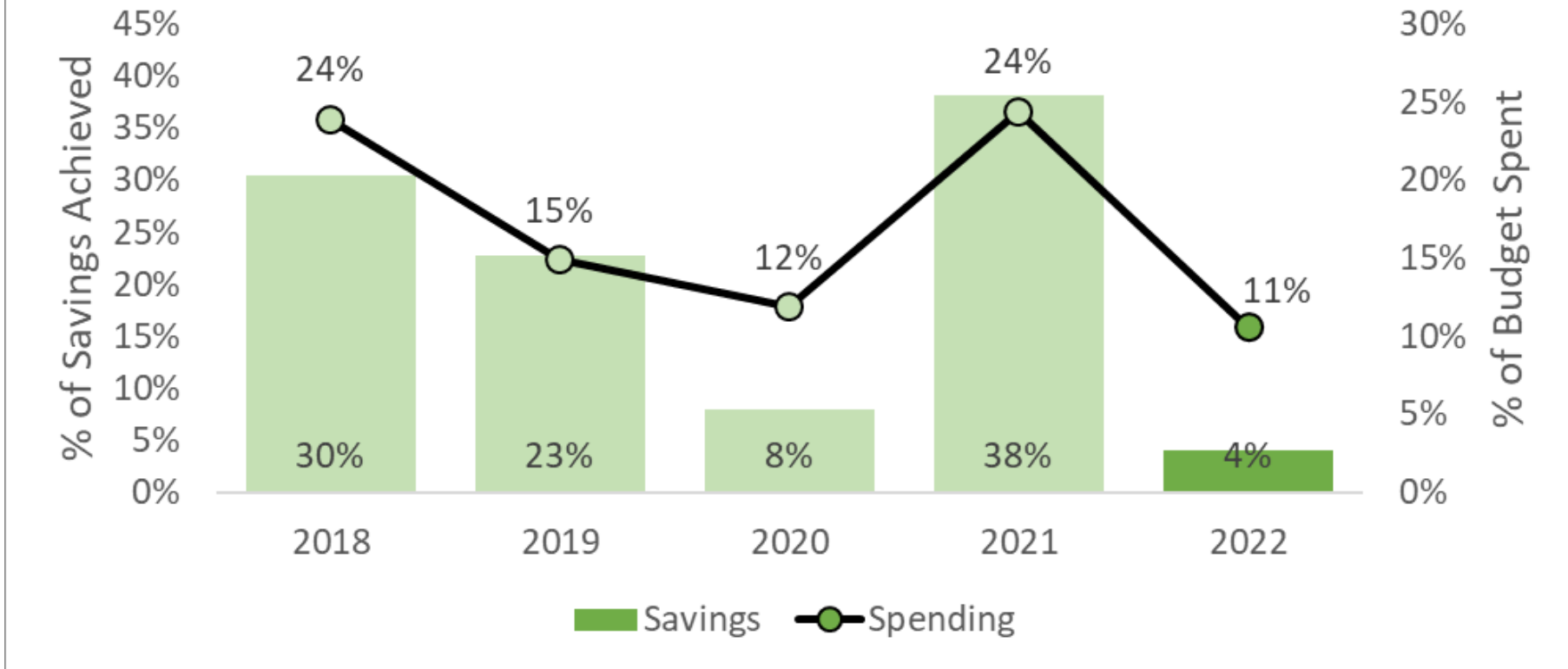




Year-End Forecast	
Lifetime Savings	75.0%
Spending	78.0%

# Electric Res Programs

EnergyWise Multifamily (5+ Units) - Lifetime Electric Savings and Spending Performance to Goal Through Q2 (2018-2022)

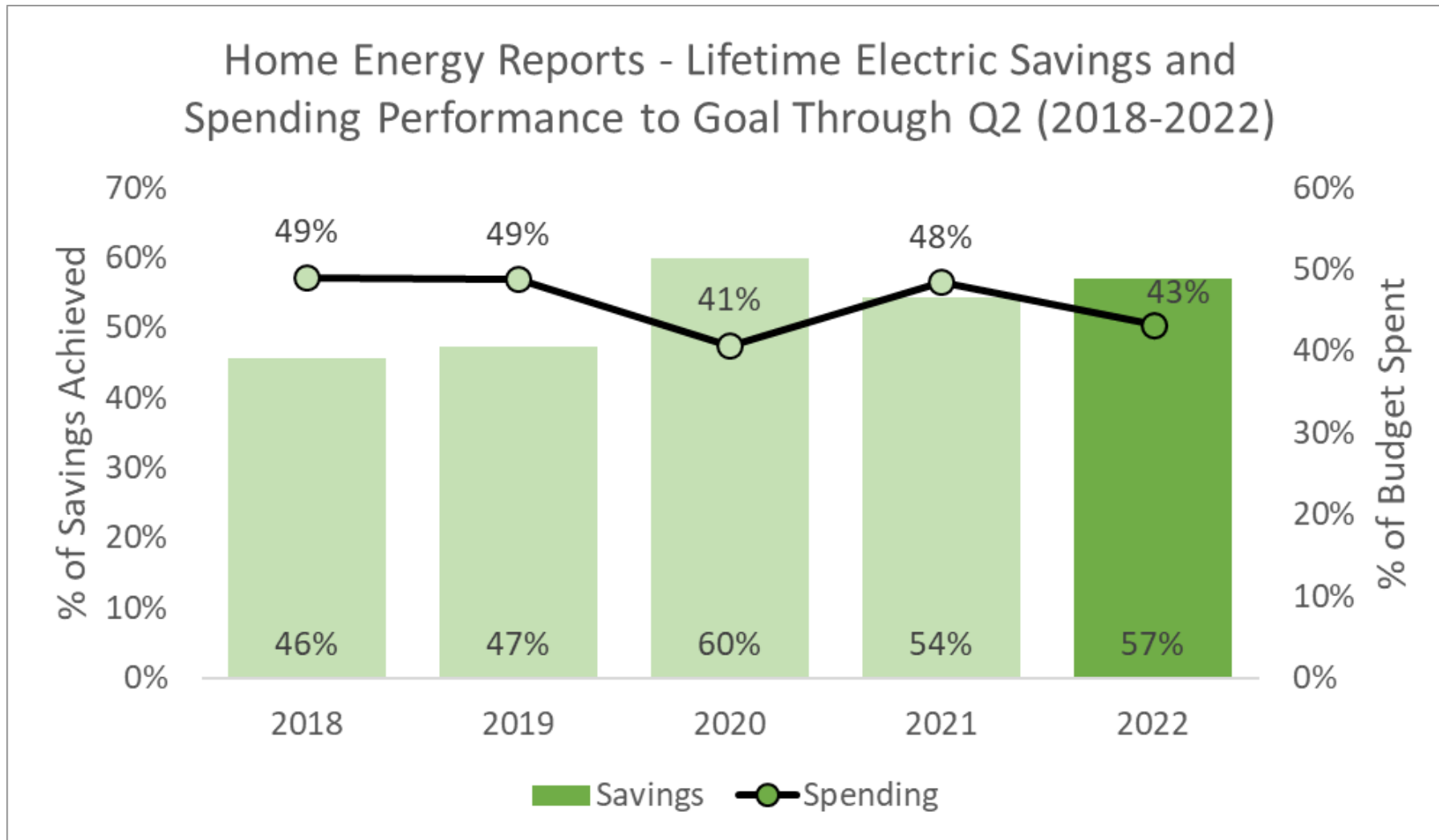






Year-End Forecast	
Lifetime Savings	100.0%
Spending	100.0%

# Electric Res Programs

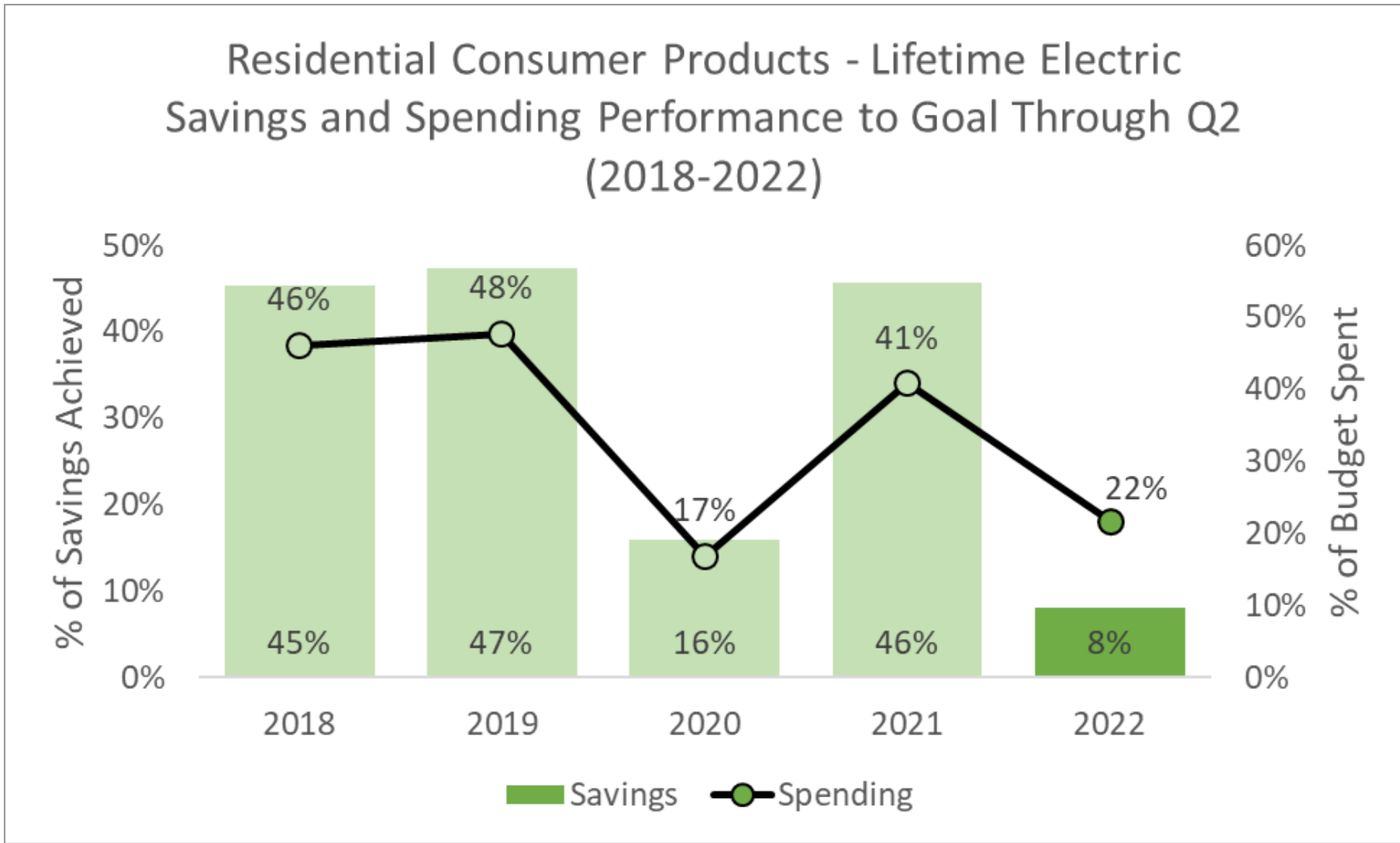




Year-End Forecast	
Lifetime Savings	79.9%
Spending	100.0%

# Electric Res Programs

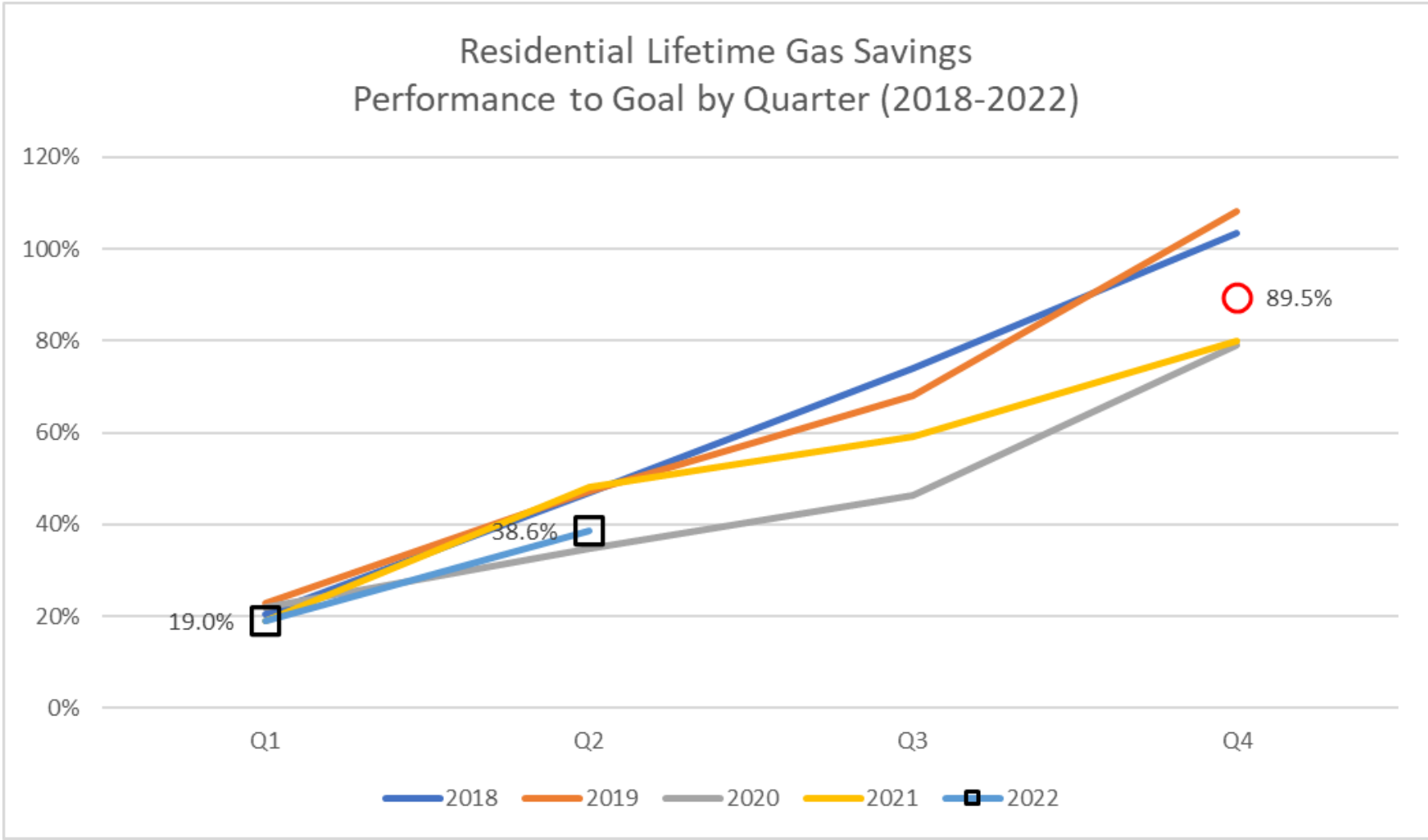
Residential Consumer Products - Lifetime Electric Savings and Spending Performance to Goal Through Q2 (2018-2022)





Year-End Forecast	
Lifetime Savings	89.5%
Spending	96.4%

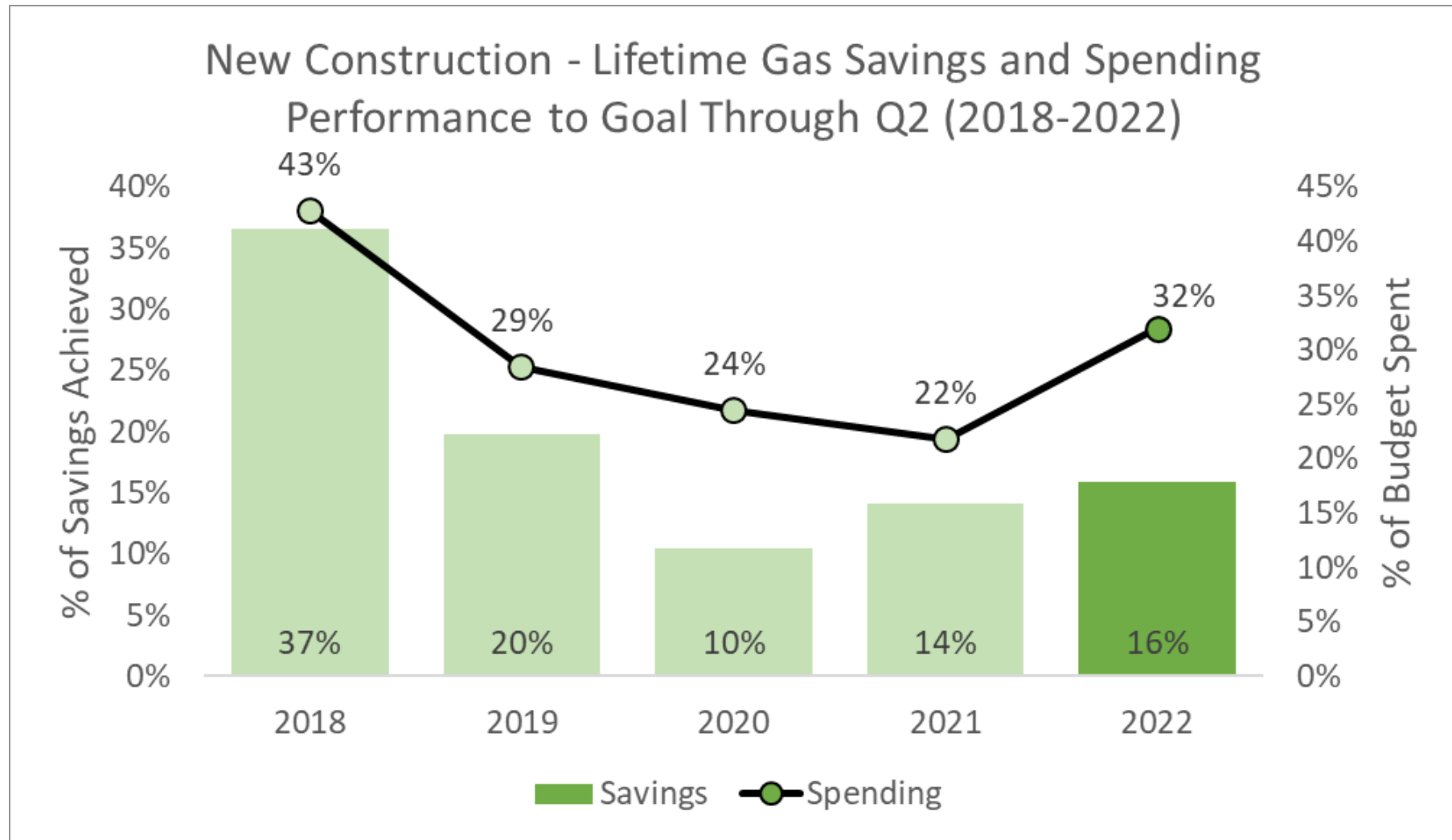
# Gas Res Forecast





Year-End Forecast	
Lifetime Savings	83.1%
Spending	100.0%

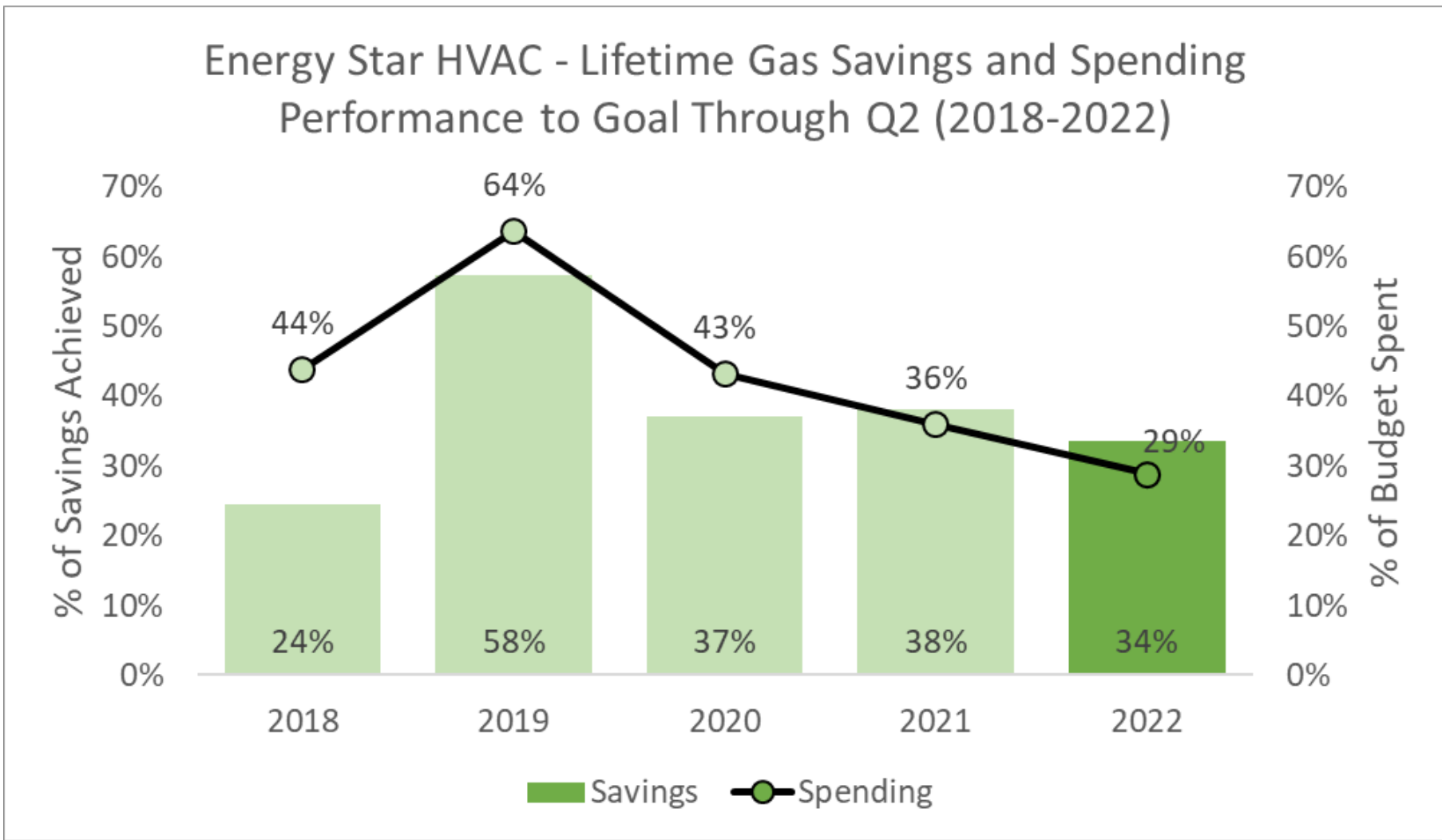
# Gas Res Programs





Year-End Forecast	
Lifetime Savings	80.0%
Spending	94.8%

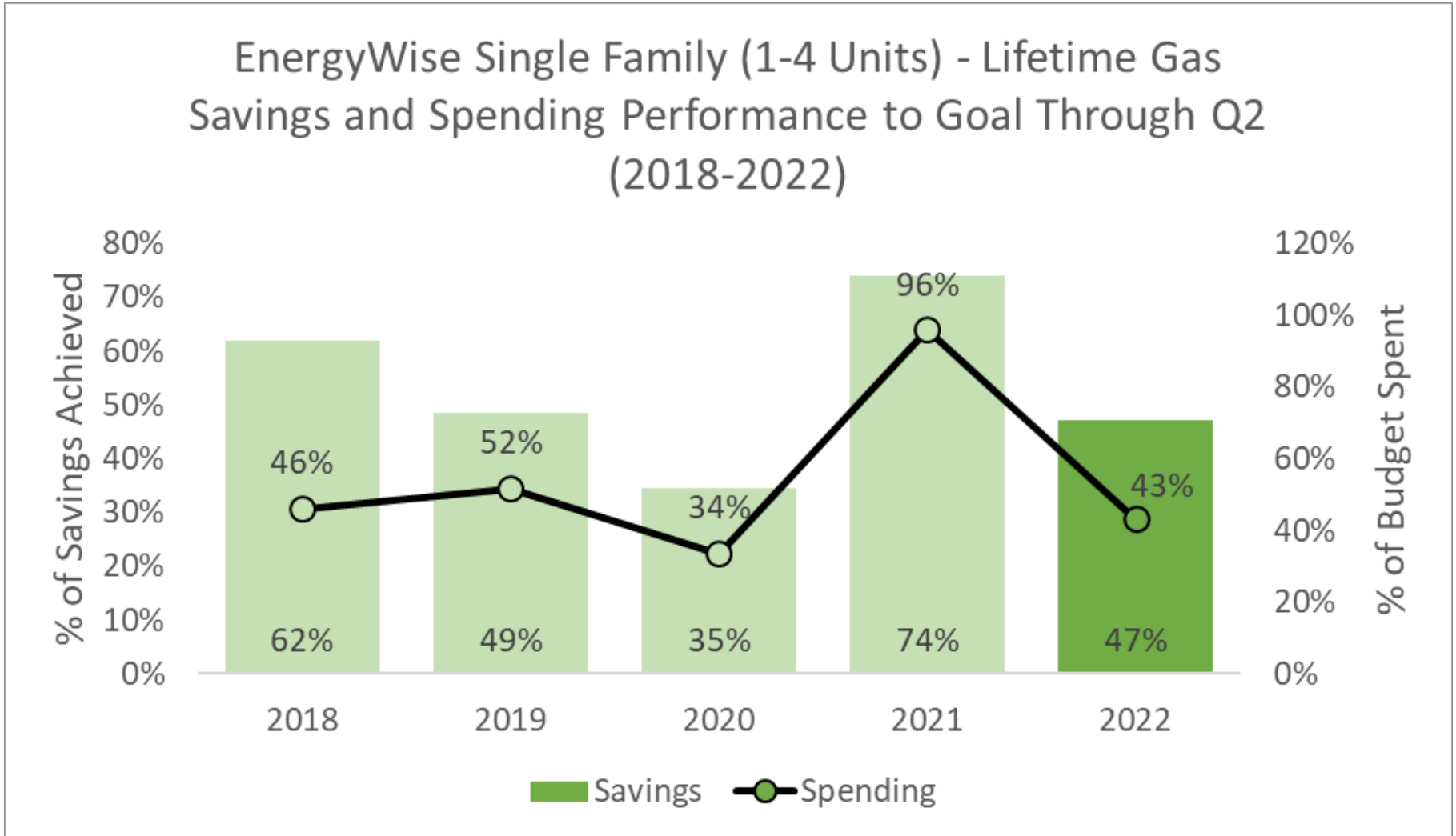
# Gas Res Programs





Year-End Forecast	
Lifetime Savings	100.0%
Spending	100.0%

# Gas Res Programs

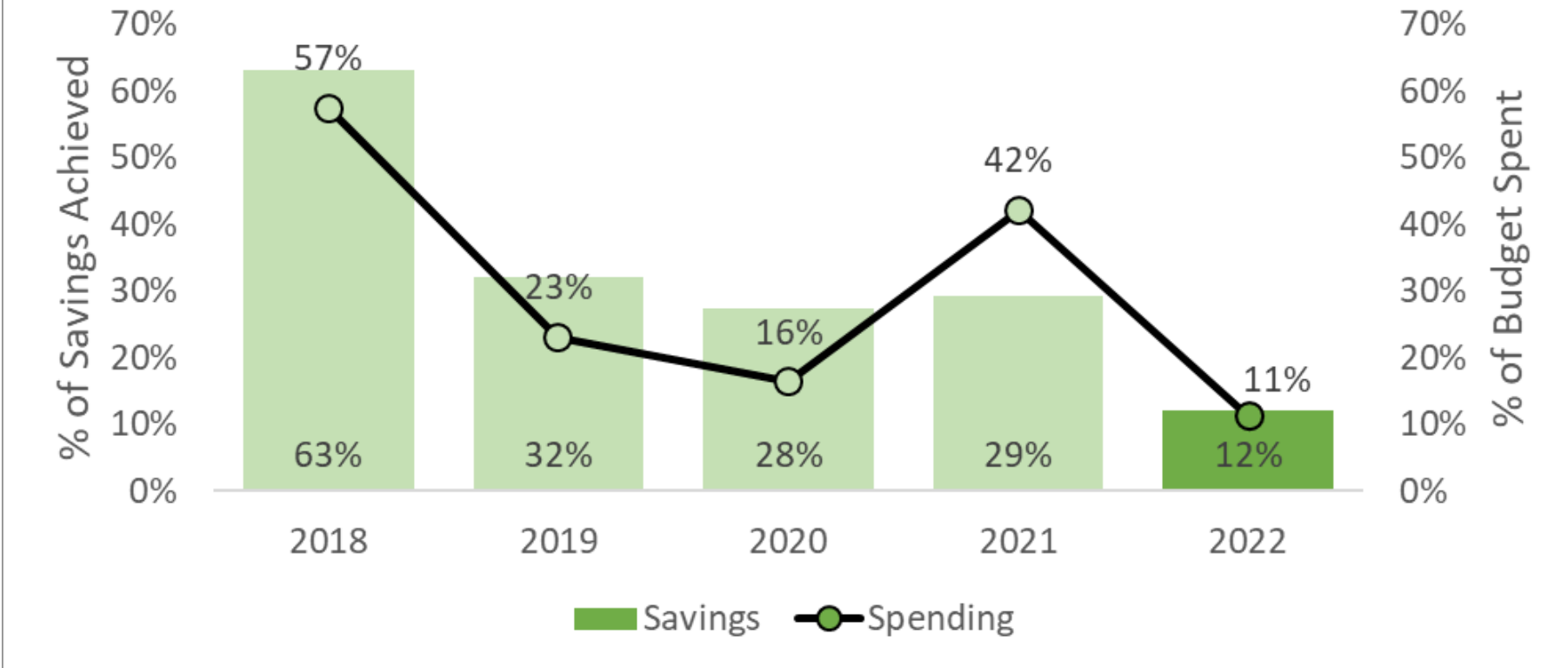




Year-End Forecast	
Lifetime Savings	80.0%
Spending	80.0%

# Gas Res Programs

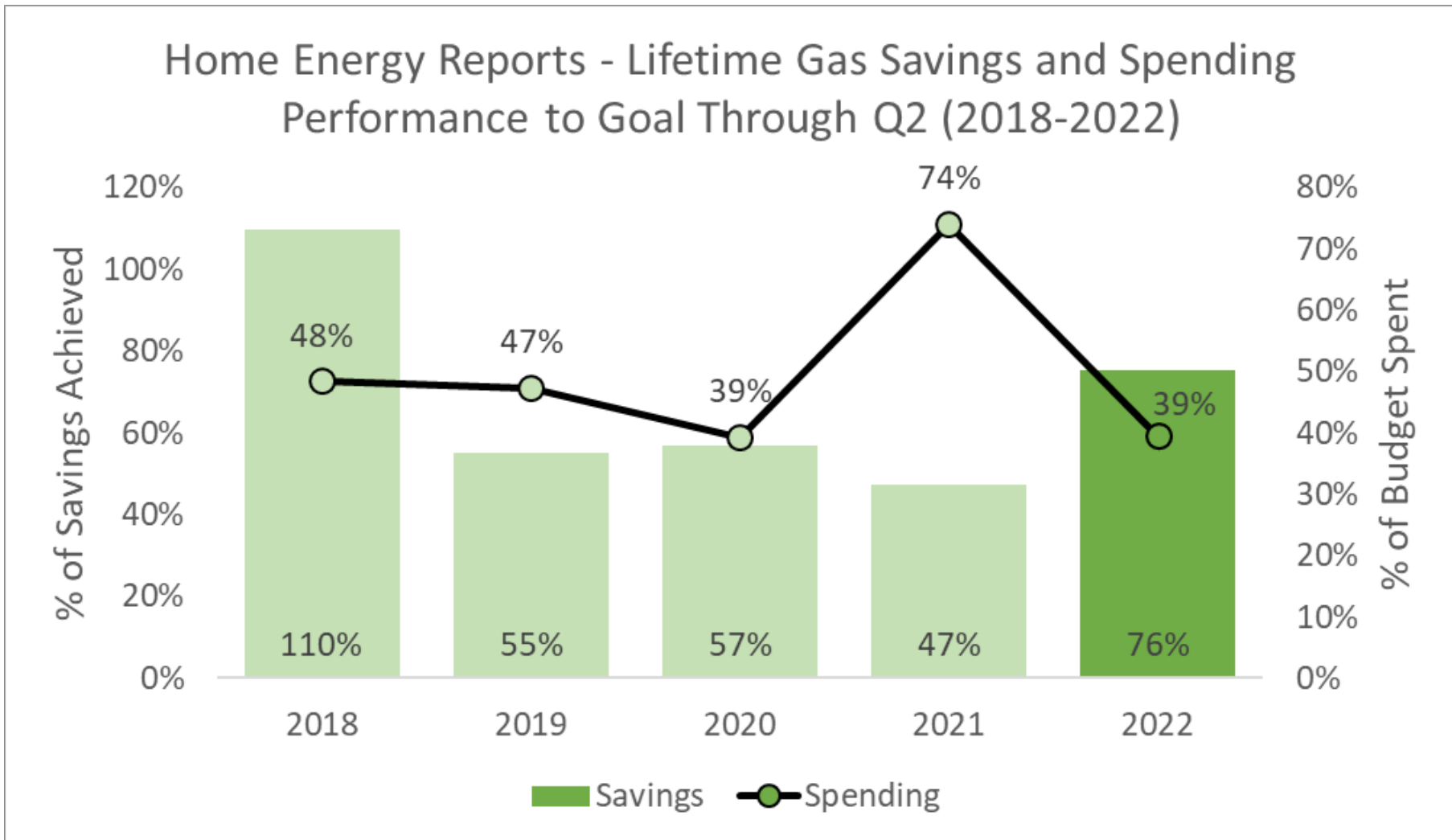
EnergyWise Multifamily (5+ Units) - Lifetime Gas Savings and Spending Performance to Goal Through Q2 (2018-2022)





Year-End Forecast	
Lifetime Savings	100.0%
Spending	100.0%

# Gas Res Programs

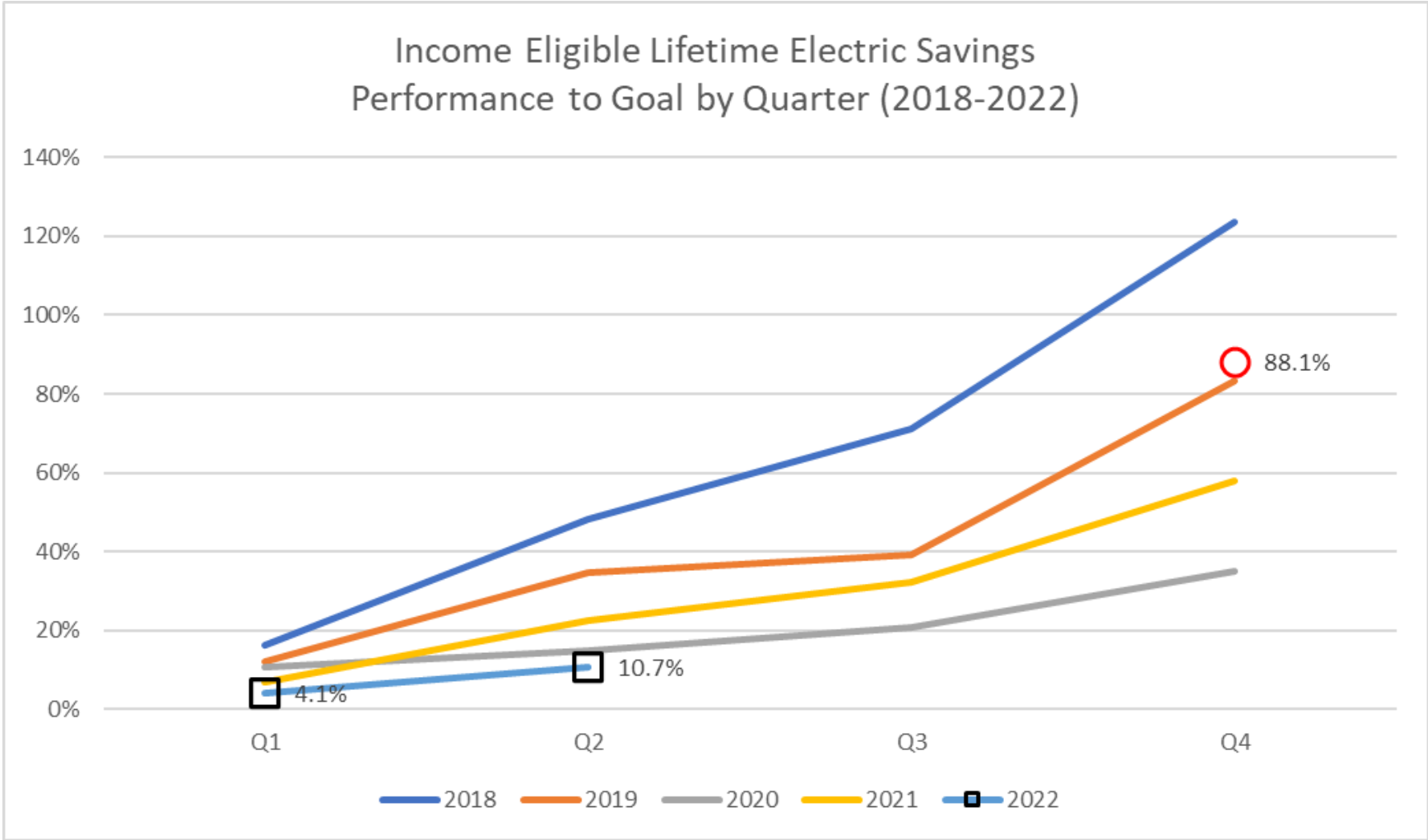






Year-End Forecast	
Lifetime Savings	88.1%
Spending	91.1%

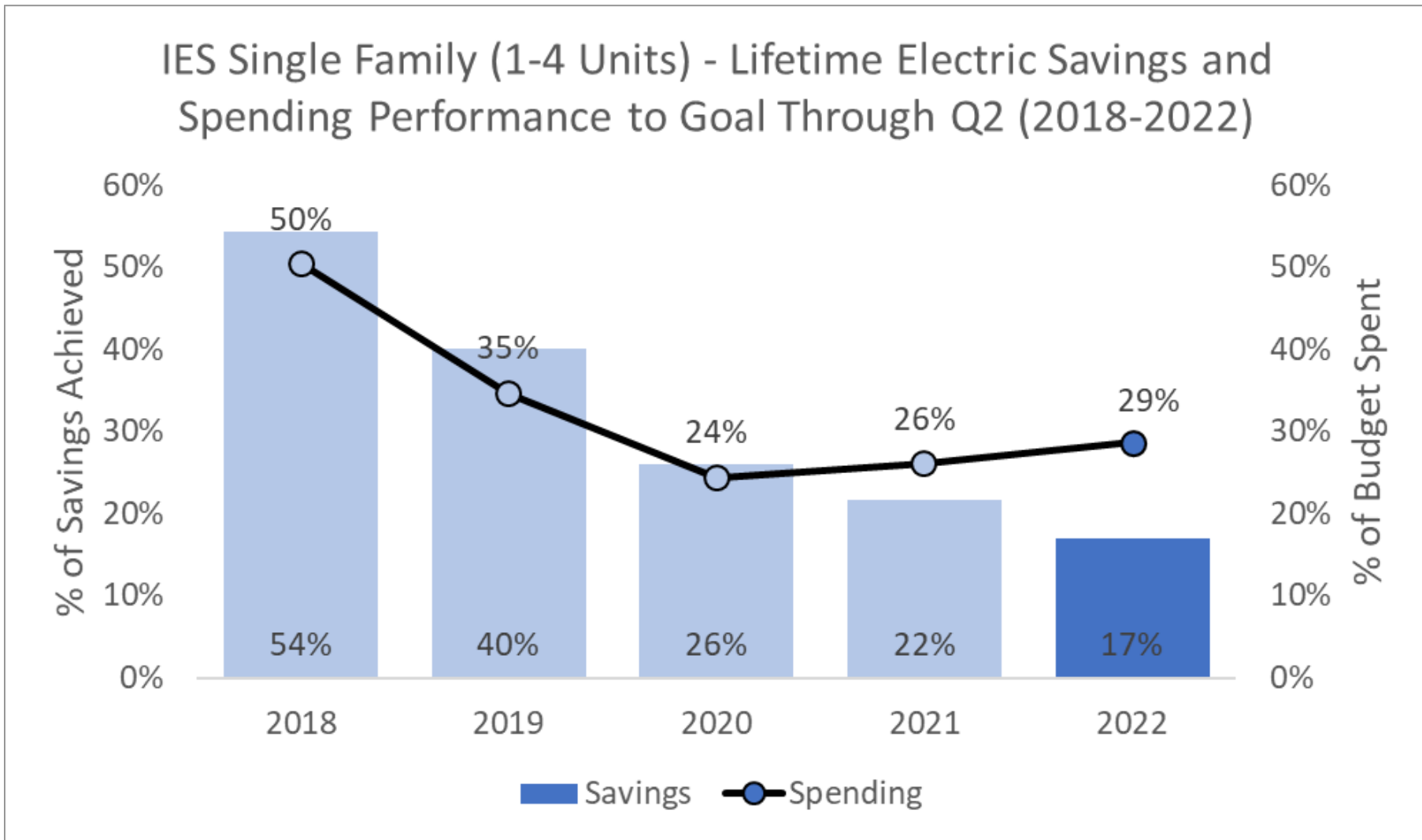
# Electric IE Forecast





Year-End Forecast	
Lifetime Savings	85.0%
Spending	90.0%

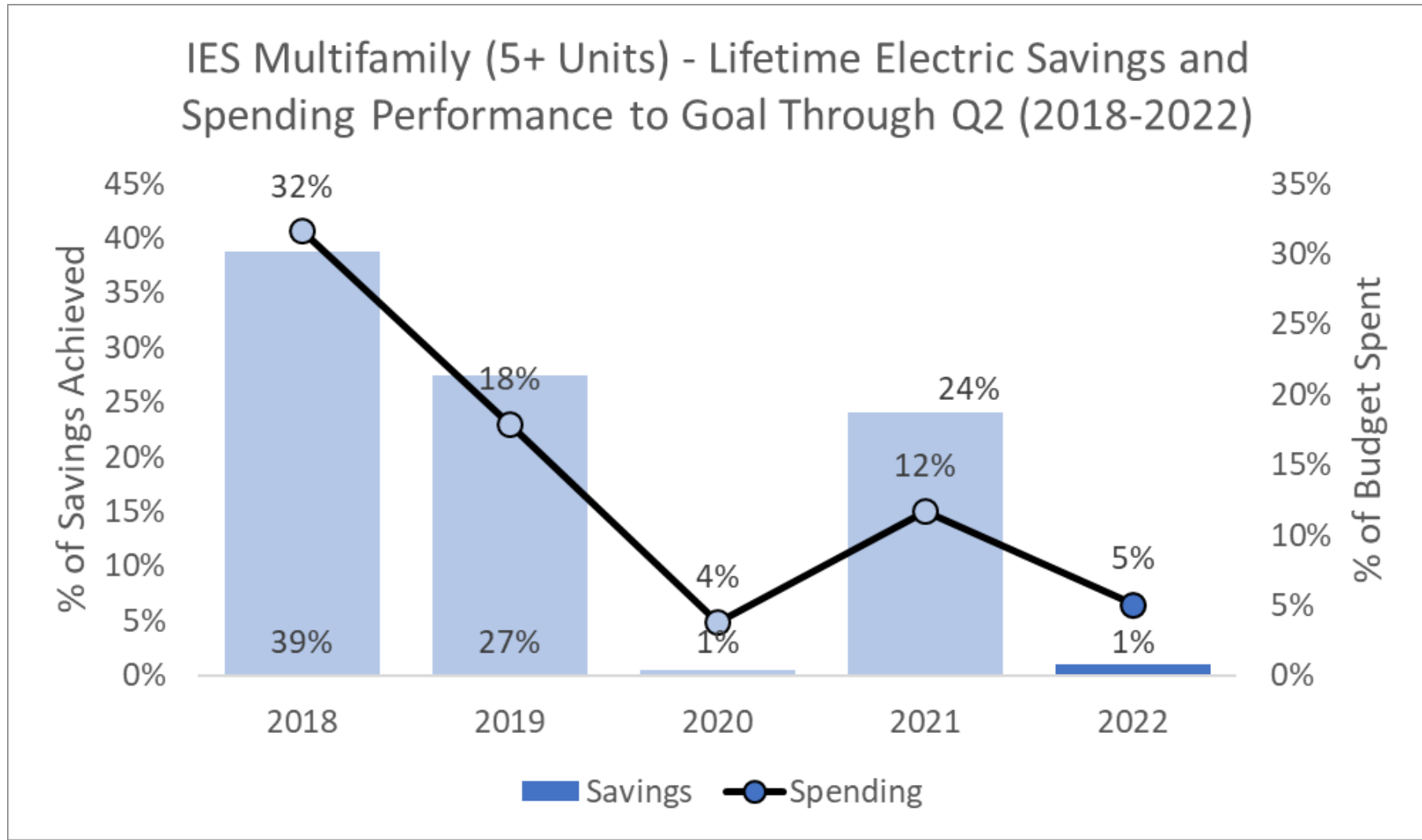
# Electric IE Programs





Year-End Forecast	
Lifetime Savings	93.0%
Spending	95.0%

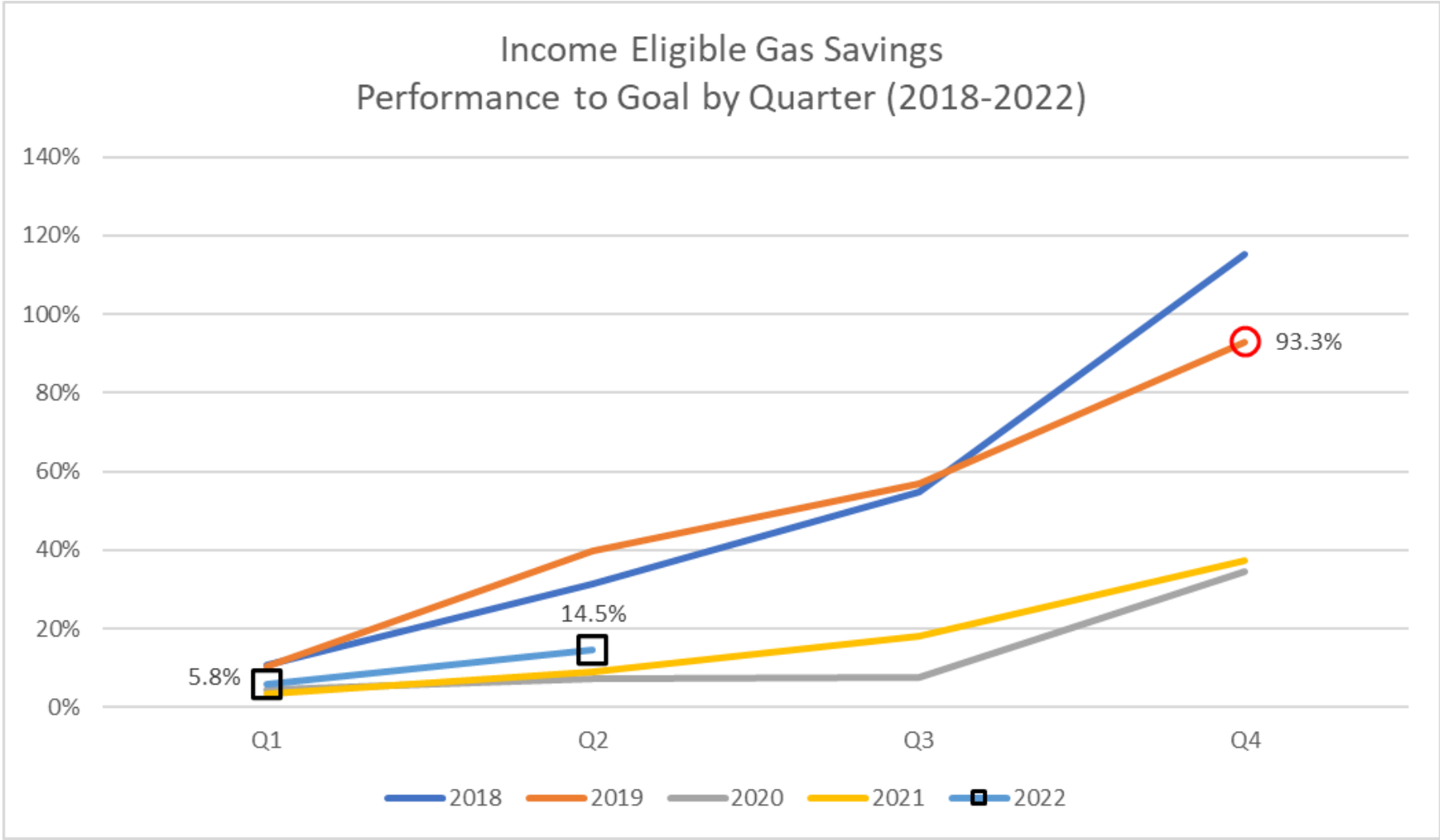
# Electric IE Programs





Year-End Forecast	
Lifetime Savings	93.3%
Spending	93.2%

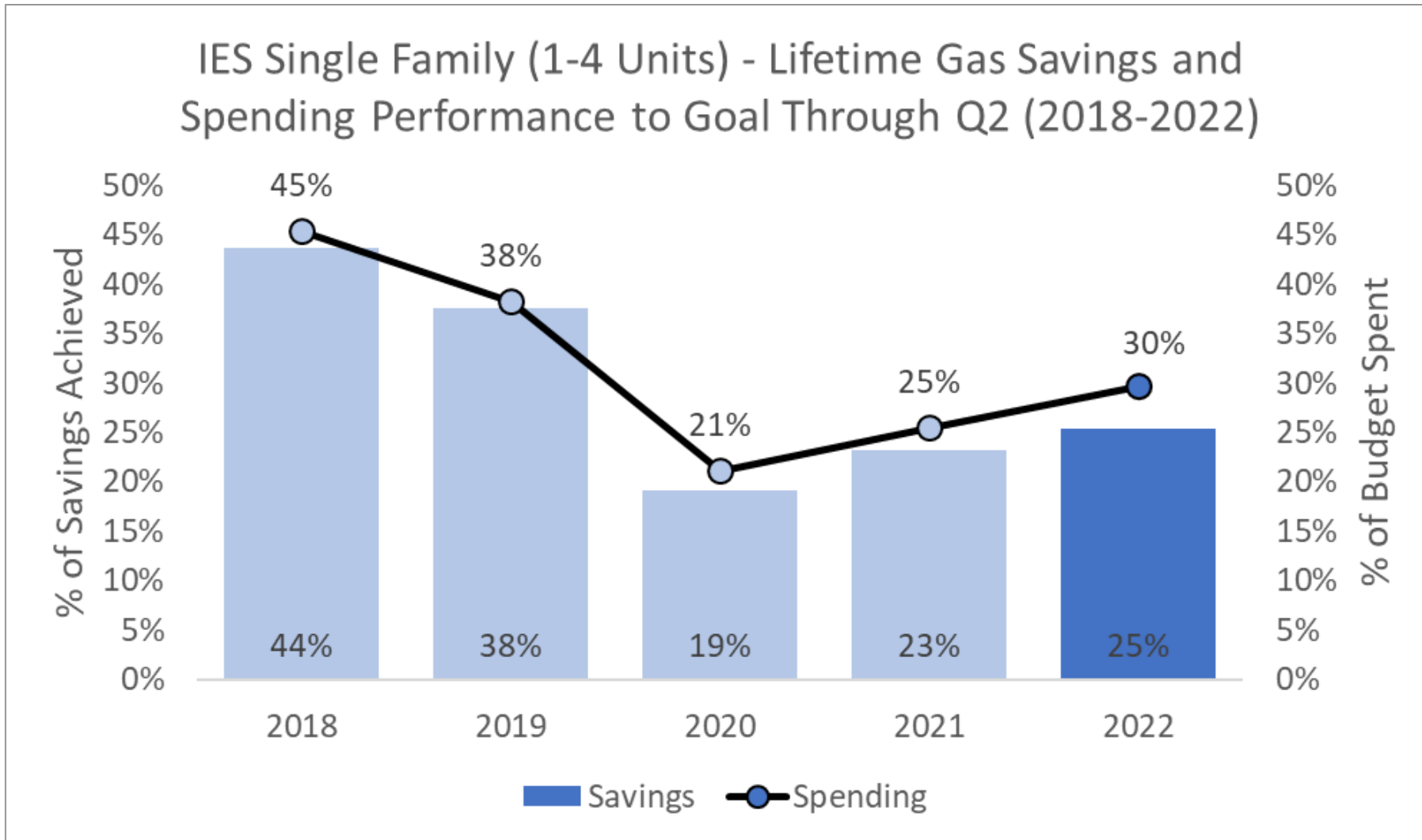
# Gas IE Forecast





Year-End Forecast	
Lifetime Savings	85.0%
Spending	90.0%

# Gas IE Programs





Year-End Forecast	
Lifetime Savings	100.0%
Spending	100.0%

# Gas IE Programs

IES Multifamily (5+ Units) - Lifetime Gas Savings and Spending Performance to Goal Through Q2 (2018-2022)

