

Memo



To: Energy Efficiency & Resource Management Council
From: EERMC Consultant Team
Date: October 18, 2022
Subject: EERMC Consultant Team 3rd Quarter Activities Report

CONSULTANT TEAM

This document summarizes the tasks, activities, and deliverables completed by the EERMC Consultant Team (C-Team) from July-September (Q3) 2022. Each item is organized to align with the [C-Team's Scope of Work \(SOW\)](#) which was approved at the April 2022 EERMC meeting.

TASK 1 – Energy Efficiency Program Planning & Implementation Oversight	
1.1 – Council Representation	
Energy Efficiency Technical Working Group (EE TWG)	<p>Participated in energy efficiency technical working groups in July, August, and September. Topics included:</p> <ul style="list-style-type: none">• Discussion on first draft 2023 EE Plan and initial stakeholder comments regarding the same• Interim update on 2023 EE Plan budget• Equity update which included information on how RI Energy is utilizing the Participant and Non-Participant study data as well as a preview of recommendations from the Equity Working Group and associated 2023 Plan commitments• Discussion of process for filing EE plan and whether other entities intended to participate in the EE docket and/or join the settlement of the parties
Equity Working Group (EWG)	<p>Attended six meetings for the full EWG and its subgroups on Outreach & Engagement and Workforce Development & Training. Topics included:</p> <ul style="list-style-type: none">• Equity recommendations and metrics for RI Energy• RI Energy Customer Advocate efforts on community education and engagement• Workforce development, diversification, and training needs• 2022 RI EE Equity Working Group Report• Progress on 2022 Equity commitments and data reporting• Ways to leverage Participant and Nonparticipant Study data findings• Weatherization battier remediation <p>Meeting participants ranged from the Green and Healthy Homes Initiative (GHHI), EERMC members/Consultant Team members, Office of Energy Resources, RI Energy, RI Department of Health, RI Builders Association, the RI Hispanic Chamber of Commerce, the RI Housing Authority, and other equity stakeholders and community members.</p>
1.2 – Plan Development and Oversight	
Residential and Income Eligible Sector Strategy & Program Oversight	<p>Conducted monthly Residential Sector Team Meetings and shared key outcomes from each with OER, Division staff, and C-Team subject matter experts. Meeting topics included:</p> <ul style="list-style-type: none">• Updates on Income Eligible Single Family Programs, including update from recent CAP Best Practices meeting• Review of responses received on Home Energy Estimators RFI

	<ul style="list-style-type: none"> • Review and discussion on 2022 plan commitments tracker • 2023 Plan development updates • Deep dive review of Q2 program performance <p>Conducted monthly review and analysis of program data from RI Energy and share monthly data report with OER, Division staff, and RI Energy.</p>
C&I Sector Strategy & Program Oversight	<p>Conducted monthly C&I Sector Team Meetings and shared key outcomes from each with OER, Division staff, and C-Team subject matter experts. Meeting topics included:</p> <ul style="list-style-type: none"> • Integration of state/federal funds into RI Energy program offerings • Review of Q2 program performance and year-end forecasts • New program offerings and redesign of existing delivery pathways • Supply chain delay and mitigation strategies • Review and discussion on 2022 plan commitments tracker • 2023 EE Plan development updates <p>Conducted monthly review and analysis of program data from RI Energy and share monthly data report with OER, Division staff, and RI Energy.</p>
Evaluation, Measurement, and Verification	<p>Conducted four cross-sector EM&V meetings to discuss progress on ongoing studies, the application of recent study results to planning and implementation tools, and leveraging study results in other jurisdictions for cost efficiency.</p> <p>Reviewed documents for six EM&V studies, including workplans, site reports, preliminary results and update memos, and full evaluation reports. Studies included:</p> <ul style="list-style-type: none"> • Non-Residential New Construction Baseline Study • Program Year 2021 Custom Electric Impact Evaluation • Program Year 2020 Custom Electric Impact Evaluation • Program Year 2020 Custom Gas Impact Evaluation • C&I Lighting Market Characterization • Cannabis Industry Standard Practice Study
Annual Plan Development	<p>Comprehensive review of materials associated with the first and second drafts of the 2023 EE Plan, including:</p> <ul style="list-style-type: none"> • Plan Narrative: For the first draft of the Plan, we reviewed and provided over 400 comments to RI Energy. We also reviewed comments provided by other stakeholders. For the second draft, we reviewed and compared the Plan with the first draft to identify key changes. We also reviewed RI Energy’s responses to ours and other stakeholders’ comments from the first draft. • BCR Models: We reviewed and conducted analyses on the Electric and Gas BCR models at the portfolio-, program-, and measure-levels, for all iterations of the Plan. In our analyses, we reviewed and compared inputs and outputs of the model with recent plans and actuals while focusing on costs, program and measure mix, and measure assumptions. • Technical Reference Manual (TRM): We reviewed the first draft of RI Energy’s TRM database and identified areas of disconnect with the BCR models. • Rate and Bill Impact Models: We reviewed updated models for structure and accuracy, responsiveness to prior C-Team comments, and newly developed delivered fuels bill impact model.

Stakeholder Engagement	Engaged stakeholders in conversations, including during technical working groups, and considered public comment received by the Council during EERMC monthly meetings.
1.3 – Education Initiative	
Education Working Group	<ul style="list-style-type: none"> • Planned and facilitated three monthly meetings (7/22, 8/22, 9/21) • Supported meeting discussions through document preparation and completion of follow-up tasks • Reviewed meeting minutes prepared by OER • Developed 2023 education budget proposal with input from Education Committee • Managed consultant work (GBRI, D&S) including regular correspondence and check-in calls • Reviewed and facilitated processing of consultant/vendor invoices • Contributed, reviewed, and compiled content for consultant deliverables • Monitored and responded to request for input on proposal review process for K-12 RFP • Worked with OER and EERMC counsel to formally establish the Education Committee (9/21)
Public Events	<ul style="list-style-type: none"> • Monitored contract drafting process and project timeline
Video Series	<ul style="list-style-type: none"> • Worked with consultant (D&S) and Education Committee to finalize scripts for all videos and plan strategy for visual content • Worked with OER counsel, EERMC counsel, Education Committee, and D&S to appropriately amend scope of work, budget, and contract
K-12 Educator Training	<ul style="list-style-type: none"> • Managed consultant (GBRI) in delivery of remaining three of five K-12 educator workshops, held in-person (8/26 morning & afternoon, 9/13) • Observed in-person workshop (9/13); Compiled feedback for improved delivery & effectiveness • Arranged and provided feedback on GBRI wrap-up presentation to Education Committee
Energy Expo at the RI Home Show	<ul style="list-style-type: none"> • Attended RIBA presentation at Council meeting (9/21) • Coordinated with RIBA to set up kick-off meeting to begin planning 2023 Energy Expo
Brand & Communications	<ul style="list-style-type: none"> • Worked with OER and Education Committee to strategize on and draft RFP for brand and communications consulting services

TASK 2 – System Reliability Procurement

2.1 – Council Representation

System Reliability Procurement Technical Working Group (SRP TWG)	The SRP TWG did not convene in Q3, though it was communicated that the SRP TWG would begin meeting again in Q4.
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2.2 – Plan Development and Oversight

Technical Support for Development of SRP Plans	The SRP Plan is developed as a single three-year plan, without individual annual plans, so no active plan development occurred during this quarter.
SRP Implementation Oversight	During the third quarter of 2022, SRP implementation oversight activities were limited, aligning with guidance received from National Grid’s SRP manager, who indicated on multiple occasions that SRP and associated TWGs for stakeholders would be on hold for a time to enable transitioning to Rhode Island Energy Staff. As noted above, the SRP TWG is anticipated to begin convening again in Q4 of this year.

TASK 3 – Regulatory Proceedings	
3.1 – Council Representation	
PUC Technical Sessions, Hearings & Open Meetings	No regulatory proceedings were active for the Council during this quarter, though general discussion did take place with individual Councilors, other stakeholders, and during Council meetings in anticipation of the docket related to the 2023 EE Plan.
3.2 – Develop and Review Technical Materials	
Cost-Effectiveness Report	The C-Team reviewed the 2023 EE Plan and accordingly drafted the Cost-Effectiveness Report, which was approved by the Council in September.
Preparation for 2023 EE Annual Plan Docket	The EERMC voted during its September 29 th meeting to direct the Consultant team to prepare materials conveying Council perspectives on the 2023 EE plan and to submit these to the PUC. These materials had not yet begun development as of the end of Q3.

TASK 4 – Council Sponsored Meetings & Materials

4.1 – Meeting Attendance

EERMC Meetings	Presented C-Team meeting materials, provided technical support, and engaged in Council discussions during the following four EERMC meetings: <ul style="list-style-type: none"> July 28, 2022 August 18, 2022 September 22, 2022 September 29, 2022
EERMC Executive Committee Meetings	The EERMC Executive Committee convened on July 28, 2022, and discussed a range of topics including: <ul style="list-style-type: none"> Updates on PUC Dockets Updates on transfer of the Council Client Fund Discussion on Council Consultant Services RFP 2022 and 2023 Council Budget
Councilor Learning, Education & Advancement Discussion (LEAD) Sessions	Facilitated follow-up discussion & activities with Education Committee after June 30 th LEAD session (formerly known as Education and Advancement Meeting). Discussed initial plans for fall LEAD session with Education Committee and C-team.

4.2 – Develop Materials

Develop Materials	Developed and/or supported development of 9 presentations, memos, and other documents to serve as EERMC meeting materials including: <ul style="list-style-type: none"> 2023 EE Plan First Draft Initial Review Presentation 2023 Council Budget Proposals Memo EE and SRP Technical Working Group Update Memo 2022 Q2 EE Program Results Presentation Q2 Equity Commitments Update Memo 2023 EE Plan First Draft Continued Review Presentation 2023 EE Plan Second Draft Initial Review Presentation 2023 EE Plan Final Draft Review Presentation 2023 EE Plan Cost-Effectiveness Report Presentation
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4.3 – Other Council Responsibilities

EERMC Annual Report	<ul style="list-style-type: none"> Coordinated printing of 2022 Annual Report hard copies Compiled comprehensive distribution list; Initiated distribution activities
Combined Heat & Power Meeting	The Annual Combined Heat & Power Stakeholder Meeting occurred in June of 2022, so there was no activity on this matter during this quarter.

TASK 5 – Research, Analysis & Other Council Support

Councilor Briefings	Supported 1-on-1 and 2-on-1 Councilor briefings as requested by EERMC members. Covered topics including Plan review comments and feedback from the C-Team, gathering Councilor perspectives on the 2023 EE Plan during its development, Council budget development, and 2022 equity progress updates from RI Energy as well as ensuring Councilors who were unable to attend meetings were fully briefed, upon request.
New Councilor Orientation	Prepared and delivered pertinent information and resources to newly appointed Councilors (7/18)
Councilor Handbook	Conducted thorough update of Councilor handbook content, including narrative, graphics, and sources to ensure it remains a relevant resource for Councilor orientation and reference.

TASK 6 – Administrative

Meeting Coordination & Logistics	Initial coordination and logistics for fall Councilor Learning, Education & Advancement Discussion (LEAD) Session
EERMC Website	<ul style="list-style-type: none">• Posted final Annual Report to all locations on website• Updated homepage sliders, about page, public education content
Quarterly Progress Reports	Completed and submitted written report documenting C-Team activities for Q2 in advance of the August Council Meeting.

TASK 7 – EERMC Intern

Energy Efficiency and Climate Intersection	Jesse Duroha, the EERMC's inaugural Mike Guerard Energy Fellow, developed an interim research memo to support Council member inquiry into the intersection of energy efficiency and climate change and the regulatory context of Rhode Island.
Equity Metric Jurisdictional Comparisons	Jesse Duroha has compiled source material which documents how other jurisdictions measure equity attainment and define equity goals for EE programs
Internship Conclusion	Unfortunately, Jesse Duroha had to resign from his internship, and from the Energy Fellows Program prior to completion due to other commitments as part of his PhD program at the University of Rhode Island.