

Memo



To: Energy Efficiency & Resource Management Council
From: EERMC Consultant Team
Date: August 18, 2022
Subject: EERMC Consultant Team 2nd Quarter Activities Report

CONSULTANT TEAM

This document summarizes the tasks, activities, and deliverables completed by the EERMC Consultant Team (C-Team) from April-June (Q2) 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)	Participated in energy efficiency technical working groups in April, May and June. Topics included: <ul style="list-style-type: none">- Stakeholder priorities- 2023 EE Plan Outline Memorandum and stakeholder comments and suggestions regarding the same- Presentation on the Building Analytics Platform from Rhode Island Energy and Leidos- High-level presentations on Participation and Multifamily Census Study and Nonparticipant Market Barriers Study.
Equity Working Group (EWG)	Participated in meetings for the full EWG and its subgroups on Outreach & Engagement and Workforce Development & Training. Topics included: <ul style="list-style-type: none">- Participant and Nonparticipant Study findings and applications- 2022 program implementation and marketing enhancements to promote equity- EWG subgroup efforts- Community outreach and engagement strategy- Workforce development and training- Equity metrics and data reporting. Meeting participants ranged from the Green and Healthy Homes Initiative (GHHI), EERMC members/Consultant Team members, OER, RIDOH, RI Energy, the RI Hispanic Chamber of Commerce, the RI Housing Authority, and other equity stakeholders and community members.
1.2 – Plan Development and Oversight	
Residential and Income Eligible Sector Strategy & Program Oversight	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: <ul style="list-style-type: none">- Updates on 2022 RGGI heat pump activities- Home energy estimators RFI- Review and discussion on 2022 plan commitments tracker

	<ul style="list-style-type: none"> - Development of potential 2023 plan deep dive meeting topics - Preliminary review of Q1 performance - Updates on invoicing lag and HVAC vendor staffing shortages - Updates on potential for pricing updates in EnergyWise - Updates on 2022 results and 2023 plan for ConnectedSolutions Demand response program <p>Developed materials for and facilitated two residential deep dive meetings for the purpose of informing the first draft of the 2023 EE plan (5/24 and 6/9). Meetings covered strategies for improving income eligible single-family services and multifamily services.</p>
C&I Sector Strategy & Program Oversight	<ul style="list-style-type: none"> - Conducted monthly C&I Sector Team Meetings and shared key outcomes from each with OER, Division staff, and C-Team subject matter experts. - Q2 C&I Sector Team Meetings focused on 2023 EE Plan Deep Dive coordination, review of preliminary Q1 program performance results, supply chain delay mitigation strategy, inflation and rising equipment costs. Small Business weatherization calculator tools, steam trap replacement and repair offerings, existing building commissioning offerings, energy management systems, Performance Lighting offerings and custom lighting installations, and the National Grid-PPL transition. - Developed materials for and facilitated two C&I Plan Deep Dive Meetings (6/7, 6/14) covering Small Business Direct Install programs, C&I envelope measures, Equity in the C&I sector, Energy Management Systems, and Existing Building Commissioning. Deep Dive Meeting discussions were used to guide the company’s development of new related program pathways, offerings, and first draft 2023 EE plan.
Evaluation, Measurement, and Verification	<ul style="list-style-type: none"> - Conducted five monthly C&I and Residential EM&V meetings to discuss progress on ongoing studies, the application of recently completed RI studies, and leveraging study results in other jurisdictions for cost efficiency. - Reviewed documents for seven EM&V studies, including workplans, site reports, preliminary results and update memos, and full evaluation reports. Studies included: <ul style="list-style-type: none"> o Nonparticipation Study o Participation Study o Automated Rooftop Unit Demonstration o Rhode Island Workforce Study o Solar Inverter Power Factor Correction o C&I Lighting Market Characterization o Program Year 2018 & 2019 Custom Electric Impact Evaluation
Annual Plan Development	<ul style="list-style-type: none"> - Worked with EERMC to establish 2023 EE Plan Priorities, which were discussed and approved at the April 27th, 2022 EERMC meeting.

	<ul style="list-style-type: none"> - Reviewed 2023 Plan Outline Memorandum, a document outlining the structure and content of the full 2023 EE Plan. - Presented 2023 Plan Outline Memo feedback to the EERMC (6/16), noting areas of strength, expected enhancements for the first draft Plan, and sector-specific considerations. - Conducted four sector-specific Plan Deep Dive meetings (5/24, 6/7, 6/9, and 6/14) to discuss key implementation strategies and best practices for inclusion in the 2023 Plan.
Stakeholder Engagement	<ul style="list-style-type: none"> - Engaged stakeholders in conversations, including during technical working groups, and considered public comment received by the Council during EERMC monthly meetings and Councilor Education and Advancement meetings.
1.3 – Education Initiative	
Education Working Group	<ul style="list-style-type: none"> - Planned and facilitated three monthly meetings - Supported meeting discussions through document preparation, distribution of notes, and completion of follow-up tasks - Managed consultant work - Contributed, reviewed, and compiled content for upcoming consultant deliverables - Reviewed & provided feedback on education RFPs (events & K-12 educator training) - Worked with OER and EERMC counsel to clarify and ensure adherence to Open Meetings Act and EERMC Bylaws
Public Forum	<ul style="list-style-type: none"> - Worked with consultant (D&S) & Education Working Group to plan, promote, and deliver the EERMC public forum (4/19)
Video Series	<ul style="list-style-type: none"> - Worked with consultant (GBRI) and Education Working Group to finalize scripts for videos #1-3 and update project timeline
K-12 Educator Training	<ul style="list-style-type: none"> - Worked with consultant to schedule and promote two of five K-12 educator workshops, held virtually
Energy Expo at the RI Home Show	<ul style="list-style-type: none"> - Coordinated with OER, the Utility, and Home Show organizers to create opportunities for attendees to learn about residential energy programs and technologies, including a home energy demonstration area constructed by career and technical school students (4/7-4/10)

TASK 2 – System Reliability Procurement

2.1 – Council Representation

System Reliability Procurement Technical Working Group (SRP TWG)	The SRP TWG convened in April and May for brief updates, with a focus on stakeholder priorities, SRP Year-End Report for 2021, and the transition to PPL. The TWGs were relatively short and high level due to anticipation of the transition, and were put on hold beginning in June to enable transition to PPL.
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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 second 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.

TASK 3 – Regulatory Proceedings	
3.1 – Council Representation	
PUC Technical Sessions, Hearings & Open Meetings	No Regulatory Proceedings were active for the Council during 2Q2022
3.2 – Develop and Review Technical Materials	
	No Regulatory Proceedings were active for the Council during 2Q2022

TASK 4 – Council Sponsored Meetings & Materials

4.1 – Meeting Attendance

EERMC Meetings	<ul style="list-style-type: none"> - Presented C-Team meeting materials, provided technical support, and engaged in Council discussions during the April, May, and June EERMC meetings (4/27, 5/19, and 6/16)
EERMC Executive Committee Meetings	<p>The EERMC Executive Committee convened on April 27th, 2022 and discussed a range of topics including:</p> <ul style="list-style-type: none"> - The departure of then-chair Anthony Hubbard - Councilor perspectives on the 2022 EE Plan hearings at the PUC - The changes for the Council’s budgeting process for 2023 - Updates on the client fund transfer process - Future Executive Committee meeting cadence.
Councilor Education & Advancement Meetings	<ul style="list-style-type: none"> - Scheduled, planned, coordinated, prepared content for, and facilitated the first of two Councilor Education & Advancement (CEA) Meetings (6/30). Topics included new Councilor introductions, facilitated Councilor discussion, and the recently completed Participation and Multifamily Census Study and Non-Participant Market Barriers Study.

4.2 – Develop Materials

	<ul style="list-style-type: none"> - Developed and/or supported development of 13 presentations, memos, and other documents to serve as EERMC meeting materials including: <ul style="list-style-type: none"> o 2022 EERMC Budget Proposal o EERMC 2023 Plan Priorities Presentation o EERMC 2023 Plan Priorities Memo o 2022 Consultant Team Scope of Work o 2022 EERMC Annual Report Presentation o EERMC Councilor Education and Advancement Meetings Memo o 2022 Q1 EE Program Results Presentation o Market Potential Study Data Refresh RFP o 2022 EERMC Key Deliverables Calendar o 2023 Plan Outline Memo Presentation o 2023 EERMC Budget Considerations Presentation o 2022 EERMC Annual Report Update Presentation o Massachusetts Three-Year EE Planning and GHG Goals
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4.3 – Other Council Responsibilities

EERMC Annual Report	<ul style="list-style-type: none"> - Produced first, second, and final drafts of the EERMC 2022 Annual Report including drafting, coordinating, and compiling content and updating design elements and formatting - Incorporated feedback, revisions, and suggested content from Education Working Group - Presented updates as requested at EERMC meetings (4/27, 5/19, 6/16)
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Combined Heat & Power Meeting	Scheduled, planned, coordinated, and facilitated the Annual Combined Heat & Power Stakeholder Meeting (6/22)
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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 ranging from Plan Outline Memorandum findings, Council budget development, and updated C-Team SOW to 2022 EE Plan implementation and EM&V activities and the development of Council 20223 EE Plan Priorities.
New Councilor Orientation	Prepared and delivered pertinent information and resources to newly appointed Councilors (6/14)
Councilor Handbook	Reviewed current Councilor handbook, outlined updates needed, developed strategy for completing a refresh

TASK 6 – Administrative

Meeting Coordination & Logistics	Meeting coordination and logistics for Councilor Education & Advancement (CEA) Meeting
EERMC Website	<ul style="list-style-type: none">- Trained OER staff on WordPress website management application to transfer website admin responsibilities from C-Team to OER- Updated content for public education events
Quarterly Progress Reports	Completed and submitted written report documenting C-Team activities for Q1 in advance of the April 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